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Educational Duties of the Hong Kong Federation of Trade

Unions: Past, Present and Future

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A Thesis Submitted for the

Degree of

Doctorate of Education

By

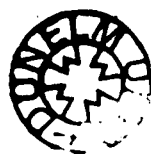
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ABSTRACT

Abstract of thesis entitled: “Educational Duties of the Hong Kong Federation of Trade Unions: Past, Present and Future” submitted by LEUNG MAN KIT, Christopher for the degree of Doctorate of Education (EdD) at the University of Durham in December 2004.

In this thesis the argument is developed that workers’ trade unions have an important role to play in promoting Lifelong Learning for working people. The thesis demonstrates that trade unions in Hong Kong once did play a strong role in workers’ education and that role became less important as time passed. Under the very special circumstances of Hong Kong since 1997, the function and political position of trade unions has altered. They are now in a position to develop their work in workers’ education once again. But it cannot be as it was in the past. Hong Kong, like many countries in East Asia is changing fast under the impact of globalisation. This means the context in which trade unions work has changed profoundly. Also, since the early post-war involvement, governmental policies and programmes in education have also evolved in which trade union policies must also adapt. This thesis argues that it is no longer the case that trade unions should supply primary or secondary education as the government now provides it. There remains, however, a real challenge a) to broaden opportunities for learning and b) to promote lifelong learning that works in Hong Kong. That challenge is being met – though not well yet – by trade unions. This study, in brief, examines the work of trade unions in Lifelong Learning.

The first 3 chapters indicate that most of the existing workers’ education programmes are organised on a market-oriented basis and there is no shortage of education opportunity for the workers as long as they are willing to learn. Yet there are signs of discrepancy of learning attitude among different social classes with significantly lower participation rate among blue-collar workers. These attitudes are probably related to the lack of social support for the working people, as described from the observation by the trade union leaders that the participation rate is particularly lower while the economic condition is poor: workers have to work harder and longer in order to stay in the workforce. Under the argument that education could assist

employment opportunity, the irony is that those who are in danger of unemployment and need to work harder would be the ones who need further education but could not afford the time and resources for education activities.

Research based on documents and secondary literature in Chapter 4 to 5 indicates that the Government had accorded workers education with lower priority and adopted “hands-off” approach in promotion of workers education. Historical materials and contemporary documents were consulted together with public debates to reflect such approach in the past. The findings however also show that this has not been changed when entering into new age. Although the Government formulates different kinds of educational programmes, both direct operation or monetary, to promote education, the orientation of the Government in promotion is from economic consideration rather than learners’ interest. As a result, some social groups cannot benefit from the Government support. On the other hand, the Government, being the major financial source on education, plays a pivotal role of the direction of education. Therefore a large part of the trade union’s educational duties depends on how they work with the government and to steer the government’s education direction towards a better equal playing field for the workers.

This thesis concludes that the Hong Kong Federation of Trade Unions should assist the workers to develop and embrace a Lifelong Learning attitude, not by simply providing educational programmes, but by exercising its political power to influence the curriculum of the primary and secondary schools in the territory, and to provide guidelines and advice for educational and vocational advancement for the workers while they are young.

I, Leung Man Kit, Christopher, declare that this thesis represents my own work and it has not been submitted to this or any other institution in application for admission to a degree, diploma or any other qualification.

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TABLE OF CONTENTS

ABSTRACT	i
DECLARATION	iii
ACKNOWLEDGEMENTS	iv
CHAPTER I. INTRODUCTION	
1.1 The general scene of Lifelong learning	1
1.2 Definition of working class and a worker	4
1.3 Definition of workers' education	5
1.4 The educational duties of the trade unions	7
CHAPTER II. EDUCATION AND WORK IN HONG KONG	
2.1 The role of education for workers	11
2.2 The effects of education on employment in Hong Kong	12
2.3 Summary of the chapter	17
CHAPTER III. METHODOLOGY	
3.1 Workers' education in Hong Kong	21
3.2 Telephone survey of people engaged in continuing education	22
3.3 Interviews with the trade union leaders: workers' education services of Hong Kong Federation of Trade Unions	24
3.4 Strengths and weaknesses of the methods	27
CHAPTER IV. PRESENT LIMITATIONS OF WORKERS EDUCATION	
4.1 Government and the education system	29
4.2 Functions of education and the attitudes of the government before 1997	31
4.3 Using education for social engineering, investment and management	32
4.4 Limitations of the education system to meet with the workers' demands	35
4.5 Challenges facing the workers today	40
4.6 Possible role of education in solving the problems of the workers	42
4.7 Using resources allocation to control educational direction	44
4.8 Summary of the chapter	47
CHAPTER V. THE AGENCY ROLE OF TRADE UNIONS IN EDUCATION	
5.1 Patterns of expectations: cultural capital in Hong Kong	49
5.2 The major agency: the government	50
5.3 Articulation agency: Hong Kong Federation of Trade Unions	51
5.4 Summary of the chapter	54
CHAPTER VI. PROFILE OF PEOPLE ENGAGED IN CONTINUING EDUCATION	
6.1 Survey of people engaged in continuing education	58
6.2 Demographic characteristics of the subjects	61
6.3 Rates of participation in continuing education	64
6.4 Nature of courses attended	69
6.5 Motivation of course participants	69
6.6 Deterrents (general)	71
6.7 Deterrents (for respondents of different backgrounds)	72
6.8 Summary of the chapter	74

CHAPTER VII. INTERVIEWS WITH THE TRADE UNION LEADERS: WORKERS' EDUCATION SERVICES OF HONG KONG FEDERATION OF TRADE UNIONS

7.1 Findings of the individual interviews	78
7.1.1 Interview with Ms Chan Yuen-Han	79
7.1.2 Interview with Mr. Leung Kai-Lik	82
7.1.3 Interview with Mr. Chan Cheuk-Hay	85
7.1.4 Interview with Mr. Wu Tat	89
7.1.5 Interview with Mr. Tam Yiu-Chung	91
7.1.6 Interview with Mr. Cheng Yiu-Tong	95
7.1.7 General observation of the SWOT analysis of individual interviewees	98
7.1.8 General observation of the PEST analysis of individual interviewees	99
7.2 Cross-referencing of the comments from SWOT and PEST analysis	101
7.3 Efficient responsiveness to market demand	105
7.4 Efficient responsiveness to workers' demand	106
7.5 Sensitive to workers' needs/familiarity to public on adult education	106
7.6 Mutual helping community – mobilisation/ members teaching	107
7.7 Members from different disciplines/ established networks/ long history with established reputation	108
7.8 Lack of resources/ insufficient places or venues/ not enough manpower	108
7.9 Lack of qualification accreditation	108
7.10 Lack of government policy	109
7.11 Poor economy affects participants' learning motivation and participation	110
7.12 Low cost	110
7.13 Integration of the themes identified by the SWOT and PEST analysis with the themes of the thesis	111
7.13.1 Challenges to the workers	111
7.13.2 Education and employment	112
7.13.3 Limitation of the present education system	112
7.13.4 Resources allocation	113
7.13.5 Agency of change	113
7.13.6 Lifelong learning	114
7.14 Pareto analysis	116
7.15 Summary of the chapter	119
CHAPTER VIII. DISCUSSION AND CONCLUSION	
8.1 Challenges of the workers today	122
8.2 Effects of education on employment	123
8.3 Limitations of the present education system	123
8.4 The leaders of workers' education	125
8.5 Proposed Approaches for HKFTU's future educational duties	126
8.5.1 Work with the government	126
8.5.2 Work with other social partners	127
8.5.3 Social services to encourage participation of continuing education	127
8.5.4 Multiple exit and entry with credit transfers	128
8.5.5 Embracing the concept of Lifelong learning	129
8.6 Concluding statements	130
REFERENCES	132
APPENDIX I	143
APPENDIX II	147

List of Tables

Table 1.1 Numbers and types of programmes offered by HKFTU	9
Table 2.1 Manpower projections to the year 2007	16
Table 6.7.1 Chi-square table for the first three deternt factors	74
Table 7.1.1.1 SWOT from Ms Chan Yuen-Han	79
Table 7.1.1.2 PEST from Ms Chan Yuen-Han	79
Table 7.1.2.1 SWOT from Mr. Leung Kai-Lik	82
Table 7.1.2.2 PEST from Mr. Leung Kai-Lik	83
Table 7.1.3.1 SWOT from Mr. Chan Cheuk-Hay	86
Table 7.1.3.2 PEST from Mr. Chan Cheuk-Hay	86
Table 7.1.4.1 SWOT from Mr. Wu Tat	90
Table 7.1.4.2 PEST from Mr. Wu Tat	90
Table 7.1.5.1 SWOT from Mr. Tam Yiu-Chung	92
Table 7.1.5.2 PEST from Mr. Tam Yiu-Chung	92
Table 7.1.6.1 SWOT from Mr. Cheng Yiu-Tong	95
Table 7.1.6.2 PEST from Mr. Cheng Yiu-Tong	95
Table 7.2.1 Strengths (cross-referencing)	102
Table 7.2.2 Weaknesses (cross-referencing)	102
Table 7.2.3 Opportunities (cross-referencing)	103
Table 7.2.4 Threats (cross-referencing)	103
Table 7.2.5 Political (cross-referencing)	103
Table 7.2.6 Economic (cross-referencing)	104
Table 7.2.7 Social (cross-referencing)	104
Table 7.2.8 Technological (cross-referencing)	105
Table 7.14.1 Pareto analysis table	118

List of Figures

Figure 6.1 The comparison of the percentage response rate for respondents successfully completed the telephone survey, partially completed the survey, declined to answer the questionnaire of the survey and no qualified respondents at home to answer the questionnaire	59
Figure 6.2 The comparison of the percentage response rate for respondents who attended courses within the past 12 months, attended courses more than a year ago and never attended courses before	60
Figure 6.3 Comparison of age distribution between respondents and corresponding Hong Kong 2001 census	62
Figure 6.4 Personal monthly income	63
Figure 6.5 Living areas of respondents	64
Figure 6.6 Working area of respondents	64
Figure 6.7 Course attendance by age group	65
Figure 6.8 Course attendance by income group	66
Figure 6.9 Percentage course attendance by occupation	67
Figure 6.10 Percentage course attendance by education level	68
Figure 6.11 Comparison of participation rates between blue-collar and white collar workers	68

Figure 6.12 Motivational analysis	70
Figure 6.13 Motivational analysis (prompted responses)	70
Figure 6.14 Major deterrents	71
Figure 6.15 Other deterrents	72

Abbreviations Used:

ACTEQ	Advisory Committee on Teacher Education and Qualification
BOE	Board of Education
EASW	Education Advancement Society for Workers in Hong Kong and Kowloon
Exco	Executive Council
GDP	Gross Domestic Product
GNP	Gross National Product
HK	Hong Kong
HKCEE	Hong Kong Certificate of Education Examination
HKCT	Hong Kong College of Technology
HKFTU	Hong Kong Federation of Trade Unions
IVE	Hong Kong Institution of Vocational Education
OECD	Organisation for Economic Cooperation and Development
PEST	Political, Economic, Social, Technological
PRC	People's Republic of China
SCMP	South China Morning Post
SES	Socioeconomic Status
SME	Small and Medium Enterprises
SWOT	Strengths, Weaknesses, Opportunities and Threats
TUC	Trade Union Council
UGC	University Grant Committee
UNESCO	United Nations Educational, Scientific and Cultural Organisation
US	United States of America
VTC	Vocational Training Council
YMCA	Yong Men Christian Association

Chapter 1 Introduction

1.1 The General Scene of Lifelong Learning

The main argument of this thesis is to indicate workers' trade unions, the Hong Kong Federation of Trade Unions in particular, have an important role to play in promoting Lifelong learning for working people in Hong Kong. This chapter is to present the philosophical framework of Lifelong Learning and its relationship to workers education for the context of this thesis. The thesis is being written at a time when the Hong Kong economy is slowing down. Unemployment is at an all time high and there is a surplus of labour supply. Even at a time in which there is a high employment rate, people are conscious of the paradox of long term unemployment existing alongside labour shortage: that certain groups are more likely to be unemployed than others. In today's leaner times, it will be those employees with the least education and training that will be most vulnerable to unemployment. This thesis aims to investigate the roles of the trade unions, the Federation of Trade Unions in particular, in promoting education in order for the workers to better prepare for the challenges of the market and to minimize the risk of unemployment.

Workers education is therefore the key component in the discussion of this thesis. Workers education is not new, as indicated in the later part of this thesis that the trade unions had been involved in providing education to the workers for many years. What is different now is the recognition that education and training have to be life-long. This Chapter establishes the theoretical framework of workers' education. Based on this framework, Chapters 2 to 4 described the historical background of workers' education and the methodology involved in the collection and analysis of the data for the thesis. Chapter 5 describes the role of HKFTU in the past, especially during the post-world War II period up to the changeover of 1997. One of the major factors that affected the educational duties of HKFTU during that period was the policy of nine-year compulsory education from the Government effective as from 1978. A child in Hong Kong, following the policy, receives compulsory education funded by the government from primary one up to secondary three. There is therefore no longer necessary for HKFTU to provide primary or secondary education to the workers' children. In this historical context, Educational activities organized by HKFTU shifted largely to part-time or continuing education.

The trade unions and the government are used to initial Vocational training and Continuous Vocational training, sometimes in the name of Continuing Education or

Adult Education. Lifelong Learning takes us one step further in recognizing that the pace of change in our knowledge-based society is so fast that only a response that engages continuous and ongoing re-shaping of our work knowledge will give us the human capital needed to ensure our employability in the future.

Unlike compulsory education, Lifelong learning relies largely on the self-motivation and active learning attitudes of the learners. Chapter 6 therefore is devoted to investigate the general profile of the people engaged in continuing education. They are the users of continuing education programmes. It is therefore important for the HKFTU operators to design programmes that meet with the needs and demands of the learners. Chapter 7 investigates the opinions of the HKFTU leaders, that is the education programmes providers. Matching the data of Chapters 6 and 7 would then give the readers a general picture of whether the HKFTU education leaders are meeting the requirements of the learners.

In the thesis, the terms adult education, continuing education and Lifelong learning are being used to describe the same learning activities, especially when viewed under a short period time frame. The term Lifelong learning however tends to describe not only activities, but also a life attitude on learning and acquiring knowledge. It is argued that Lifelong learning is a necessary attitude for the workers to survive in the current rapidly changing environment. For example, as technology has developed rapidly, machines have largely replaced manual work and the proportion of low-skilled worker has been decreasing. Workers need to become knowledgeable in the modern society. Workers education is indeed non-separable from the concept of Lifelong Learning, so it is always important to see that providers of workers education, such as the trade unions and the Government, should embrace the concept of Lifelong Learning in their education services or policy.

The concept of Lifelong Learning has been advocated by international organizations including United Nations Educational, Scientific and Cultural Organisation (UNESCO), the Organisation for Economic Cooperation and Development (OECD), the European Union (EU) and the Council of Europe and the World Bank since the 1960s. In 1960, the UNESCO International Conference on Adult education, named “Adult Education in a Changing World” set Lifelong Education as a goal for the future policies of governments. The term “permanent education” first emerged in a UNESCO conference in 1965 from Lengrand. Later, “An Introduction to Lifelong Education” was published in 1970. Lengrand here used “Lifelong education” instead of “education permanent”. The Lifelong education concept has been widely discussed

and promoted in international conferences from the 1970s. The UNESCO published a report “Learning to be” (1972) to propose Lifelong education concept, this report was released at the Tokyo conference on adult education. It stated the education should occur throughout life, from cradle to grave. Also, education can be processed in formal and non-formal settings. It proposed developing more pluralistic and accessible opportunities for education throughout one’s lifetime and to remove barriers that retard access to education.

The original emphasis of OECD was on outputs (learning) rather than the inputs (education, training and self-study). It put an emphasis on the continuing acquisition of knowledge. In 1973, OECD produced a document *Recurrent Education: A Strategy for Lifelong Learning* (1973). Recurrent education was described as “the distribution of education over the lifespan of the individual in a recurring way”. (OECD 1973, cited in Jarvis, 1995). The shift of outputs to inputs indicated the success of Lifelong Learning relies not only on the participants but also the providers. Following the same line of argument, OECD ministers of Education adopted “recurrent education” as a direction for long term planning of education in 1975.

Many countries are concerned about their economic development and promote Lifelong Learning as a way to enhance the competitive edge. European Union policies, for example, have been developed since the early 1990s in order to ensure that Europe was competitive with the US and Japan. To maintain Europe’s competitiveness, the European Union became interested in Lifelong Learning in 1990s and produced a Memorandum on Higher Education (1991) which made proposals for universities to support an expanding knowledge-based economy and proposed universities should offer highly qualified personnel to the labour market.

The OECD continuously discusses the details in operating Lifelong Learning in its member countries. In December 2000, the OECD and Human Resources Development Canada organized in Ottawa an International Conference on “an Affordable Investment”. It examines the economic and financial issues that arise in implementing Lifelong Learning and considers how the public and private sectors are actually addressing or might address them. It addresses the issues of resource allocation and financing framework for Lifelong Learning and government intervention in Lifelong Learning provisions (OECD, 2001).

Hong Kong is no exception in the tide of Lifelong Learning. In his 1998 policy address, the Chief Executive stated that Lifelong Learning would become more

important in 21st century and encouraged people to positively pursue continuing education. When the government has reviewed the education system in 1999, Lifelong Learning has been a theme for reform. Continuing education is promoted in the community. More and more people participate in continuing education courses in their spare time and educational institutions provide various kinds of courses to cater for learners.

1.2 Definition of Working Class and a Worker

This study tries to investigate the effects of Lifelong Learning on workers. It is therefore essential to specify the meaning of workers in the context of this study. Workers could be described according to the concept of social classes: most social scientists believe that populations can be classified according to social-class groups, which differ in their economic, social, and political interests and characteristics. W. Lloyd Warner and his colleagues developed one of the most commonly used classifications for social-class groups in United States in the 1940s. They used four main variables (occupation, education, income, and housing value) to classify individuals and families in five groups: upper class, upper middle class, lower middle class, upper lower class and lower lower class (Warner, Meeker and Eells; 1949; Miller, 1991). Today, the term working class is more widely used than lower class, but social scientists still use measures of occupation, education, and income to describe three to six levels of socioeconomic status (SES), ranging from upper class at the top to lower working class at the bottom. The working class is generally further divided into upper working class (including skilled crafts workers) and lower working class (unskilled manual workers). Skilled workers may be either middle class or working class, depending on their education, income, and other considerations such as the community in which they live.

Analysis of social class structure in Hong Kong has been in general along these lines, with further influence by Weber, employing such concepts as working class, petty bourgeoisie, middle class, and upper class, or broadly the non-manual and manual classes, although usually with modifications (Weber, 1978).

For Wong and Lui, social classes in Hong Kong are divided into seven categories: (1) upper service class (high-grade professionals, administrators and managers); (2) lower service class (low-grade professionals, administrators, managers and technicians); (3) routine non-manual employees; (4) petty bourgeoisie; (5) lower-grade technicians and supervisors; (6) skilled manual workers and (7) semi-skilled and unskilled workers.

They further group classes 3-5 together as the intermediate class, and classes 6 and 7 as the working classes (Wong and Lui, 1992). Although there are variations in the above classifications, Wong and Lui make a clear distinction between upper-middle and working classes, or non-manual and manual classes. This thesis adopts the classifications of working class from Wong and Lui in which non-manual workers from classes 6 to 7 are defined as white-collar workers and manual workers from 6 to 7 as blue-collar workers.

Workers, for the sake of simplicity in this thesis, are defined as the members in the working class under Wong and Lui's classification. Workers are therefore mainly labourers or manual workers that usually belong to the lower social class of Hong Kong earning relatively low wages.

1.3 Definition of Workers' Education

In-line with the development of democracy and human rights, some educators (for example, Bowles and Gintis, 1976) argue that although people may have varying aptitudes and interests, all of us share a common human nature and inhabit a common planet. A liberal education for all, regardless of future occupation, enhances a sense of community and helps students realize their full human potential and, therefore, have more options. It is not ethical to force students into various classes and limit their options by training in a specialize field alone. On the other hand, it is also impossible to ignore the importance of vocational training. Skilled workers specialized in certain trade skills are required to help support their own living and to keep the system running.

In general, workers' education itself can then be understood as having two distinct branches: belonging either to the technical-professional school or to the consciousness-raising/activist school. Hellyer and Schulman (1989), for example, support the consciousness-raising/activist models of education: The desired outcome of workers' education for them can be measured by "the extent to which workers and their allies could unite by using education to bring about changes in the workplace and in the wider social context" (p. 572). Believing workers' education should develop critical awareness and social action, they make a point to reject the "personal development and job skills" focus of human resources development. They write, "The educational activities of workers, when defined by their interests, go beyond the acquiring of job skills or managing a union. Educational activities must be an integral part of social action" (p.574).

For both Barbash (1955) and Hopkins (1985), an essential element to the format of workers' education is collective learning in which the learners need to identify themselves as members of the labour-selling class, not simply as individuals. This necessarily requires dialectic pedagogy, in that workers are learning to improve their situation relative to the owners of capital, although it does not mean that all collective learning is of a consciousness-raising type. Indeed, many unions have relied on the collective-learning model but have used it to engage in technically based education.

On one hand, the above may represent a successful strategy for some unions and workers worried about how a lack of skills may make their workplaces less competitive and therefore lead to job losses, for others, such union-initiated technical education raises concerns because its content often differs little from that of company-initiated training designed to improve workers' stock of "human capital" (skills, specific work-related knowledge etc.)

Therefore many authors see workers' education as separate from the apolitical, individualized, functionalist approach that is central to human resource development. This "non-workers' education" constitutes much of mainstream adult education or the conservative union-run workshops on leadership, collective bargaining, and health and safety. The aim of workers' education, they maintain, should be to free the learner from being simply a cog in a system. In such a model, the role of the professional educator is quite different from that under the human-capital model, with the educator serving not as the "powerful" purveyor of knowledge [but as] another educational tool of the worker/students who seeks a purposeful education" (Zacharakis-Jutz & Schied, 1993, p. 109).

Hannah and Bueno Fischer (1998) suggest that much of the difference in approaches to workers' education taken by unions is a reflection of their philosophical orientation. Researching British and Brazilian workers' education, the authors concluded that education offered by Brazil's left-wing Central Unica dos Trabalhadores was much more critical of global capitalism than was that provided by Britain's centrist Trades Union Congress. In this case, the split between skills-based education and using workers education for consciousness-raising objectives was a reflection largely of political ideology. This is exactly why it is essential for this thesis to interview the educational providers from the Hong Kong Federation of Trade Unions. Their educational philosophy is shaping the approaches of the workers' education in Hong Kong.

With the form, content, and definition of workers' education varying so widely, Hopkins (1985) adopts a very broad definition of workers' education as "that sector of adult education which caters for adults in their capacity as workers and especially as members of workers' organizations" (p.2). Within such a broad definition, he identifies five major components, which provide (a) basic general skills; (b) "role skills" for union and workers' organization activity; (c) economic, social, and political background studies; (d) technical and vocational training; and (e) cultural, scientific, and general education. This inclusive definition covers all organizations that function to educate working adults, be they trade unions, workers' educational associations, cooperatives, rural workers association, churches, labour colleges, or the accredited, permanent universities. Given that in this study the author presents an analysis of educational responses demanded by and provided for various groups, here a very broad definition of workers' education that follows that laid out by Hopkins is adopted. Instead of defining workers' education according to the nature of the educational programmes, this thesis refers to workers' education as education that is imposed upon the workers, education that is designed for the workers and education that is demanded by the workers. In a later part of this chapter, all of the above criteria of workers education are in fact in line with the concept of Lifelong Education.

1.4 The Educational Duties of the Trade Unions

The purpose of this thesis is to study the educational role of the Hong Kong Federation of Trade Unions (HKFTU) in worker's education. The HKFTU is a pro-Beijing labour and political group in Hong Kong. The reason for conducting this investigation is because the HKFTU is the biggest trade union organization with membership of around 300,000 under 177 affiliates (mainly trade unions) in Hong Kong and, since its establishment in April 1948, has a long-term commitment to providing education to the workers. The second largest trade union organization is the Hong Kong Confederation of Trade Unions (HKCTU), a pro-democracy labour and political group formed only in 1990, and has 160,000 members in 61 affiliates (Registry of Trade Unions, 2002).

The HKFTU historically, has played a strong role in education – both in supplying cadre training and formal education. The HKFTU has always been involved therefore in adult education.

The following table indicates the types of training courses organised by the

Spare-Time Study Centre, the education arm of the Hong Kong Federation of Trade Unions. All the courses are part-time basis designed for people, either in employment or engaged in full-time education, to enable them to upgrade their practical skills and enhance their academic qualifications and standing. The Part-time courses are offered either on a Part-time Day (PTD) or Part-time Evening (PTE) basis spread over the 30 study centres of the organisation.

As indicated in the table, a wide range of vocationally oriented courses is available for the students. Some of the courses are for Certificate/Diploma holders to upgrade their qualifications to a Higher Certificate through either part-time day or part-time evening mode of study. Most of the courses are of short duration from several hours to a few months. Some of the courses may be highly focused which aim to develop and upgrade learners' workplace competencies and professional skills. Some courses however may be on general interest subjects and serve to cater for learners' non-academic interests.

Normally short courses have no stipulated entry requirements and do not lead to academic awards, but learners are usually issued certification of attendance. Diploma and certificate programmes come in a great variety of types and provision. Some diploma and certificate programmes, which come under a structured hierarchy of continuing education, are specially designed to provide working adults with an educational opportunity for lifelong enhancement of their professional knowledge and skills.

Though all of these programmes are offered on a part-time basis, the duration of study depends largely on the subject and content of a specific programme. Sometimes certificate programmes help lay the foundation for a learner to progress up the qualifications ladder. There is however not a single course that designed specially to address the ideology on social class awareness of working classes.

Key Area of Study	Number of Courses	Key Area of Study	Number of Courses
Distance Learning for certificate, diploma or higher qualifications	27	Summer Programmes	162
Courses jointed organized with Shenzhen and Guangzhou Authorities	22	Special Course: Custom Regulations of the China Government	1
Vocational/Technical	55	Courses for Vocational Assessments from the China Government	8
Arts and Social Philosophy	64	Commerce and Management	142
Leisure	144	Health and Recreational Courses	233
Languages	109	Music, Dances and Drama	154
Computing and Information Technology	308	Cooking Courses	103
Courses for Senior Citizens	30	Courses for children and teenagers	77
Employees Retraining	10	Skill Improvements	25

Table 1.1: Numbers and Types of Programmes Offered by HKFTU (Source of data: HKFTU, 2005)

Since adult education has been replaced in the contemporary discourse on post-compulsory education by the idea of lifelong learning, the HKFTU should have an important role to play in promoting lifelong learning. As Field (2001 pp. 1) states “lifelong learning has emerged onto the contemporary policy scene with the suddenness of a new fashion”, and that lifelong learning has been adopted as guiding principles of educational policy (UNESCO, 2000 pp.54). It has been found that there is huge demand for continuing education in Hong Kong (Lee, 2001 pp. 1). It is therefore important to know the educational philosophy of the leaders of HKFTU because the worker members rely on the trade leaders to bargain with the government.

The pro-China HKFTU has a strong political linkage to Mainland China and, therefore has had a much stronger influence on the government policy after 1997. Power must go together with vision. If the education vision of the leaders of HKFTU matches with the interests of the workers, it would be easier for the workers to advance their personal goals through education as lobbied and influenced by their leaders.

Given the complexity of changes that have taken place in Hong Kong over the past decade, and given the current uncertainties in the city’s future, it is no longer clear what the worker’s interests are. An education system that designed only to cater for the explicit needs for the workers might not provide the best benefits for the workers. For example, Hong Kong’s economic success has depended upon the city’s ability to

attract foreign investment and trade and this ability might be undermined by political moves from Beijing that restrict the freedom of Hong Kongers to trade, and devalue the place in the eyes of overseas investors. A broad model of education comes into view therefore as something very fundamental to the long-term future of the city. There are other needs that extend into the realm of rights and interests. If the educated are to be persuaded to stay and work hard, they will need to feel that their achievement is valued and acknowledged so that they can contribute the future development of their city and country. These educated people could be anybody from high to low social classes. In short, the Trade Unions should balance the needs, not only for the workers, but almost any social sectors in order to keep Hong Kong a good place to stay and earn a living for the educated. Workers can only benefit themselves if there are works to be offered from the markets.

Events as from the recent hand-over of sovereignty to Mainland China in July 1997, the Asian financial crisis in the 1998, the collapse of the property markets in the same year, the increasing unemployment rate, the changes of the economic structure and the increasing government deficit in the past few years all pose a greater challenge to the workers of Hong Kong today. With no immediate solution to solve immediate problems, the government, the businessmen, the workers themselves and also the unions already turn to education as a long-term resort for answers.

It is important to recognise that many of the issues being explored in this thesis have echoes elsewhere in the world. Labour movements in very different international contexts are having to confront major changes that are driven by global economic pressures and which can be deeply uncomfortable for traditional trade union organisation (Regini *et al.* 1992). Workers' organisations cannot necessarily rely on traditional class based loyalties and must find new ways to connect with their members and to meet their members' needs (McIlroy 1988, Taylor 1994). In many countries trade unions are responding to this new agenda by increasing their interest in providing educational services for members (Streek 1992). Whilst it is important to acknowledge these international developments it is also important to recognise how individual cultural contexts shape developments in unique ways. This thesis seeks to explore these issues therefore within the specific context of Hong Kong.

Chapter 2 Education and Work in Hong Kong

2.1 The Role of Education for Workers

The basic assumption of this thesis is that education has an impact on the livelihood of workers. This chapter is to review existing evidence on the impact of education on workers' affairs as a context for the investigation in later chapters.

It is generally observed that education attainment tends to have a positive correlation with income level as well as employment opportunity. "A well-educated and well-trained population is important for the social and economic well-being of countries and individuals", as Organization for Economic Co-operation and Development (OECD) puts it (OECD, 2001 pp. 54). It is possible that education can be used as a social ladder that assists the workers not only on a vocational basis but also on a social upward mobility basis. Successfully educated, the workers can have better option for their jobs and career development. On a country perspective, education and "economic, social and cultural development" are linked directly (United Nations Educational, Scientific and Cultural Organization (UNESCO), 2000 pp. 84). Better educated workers may imply higher quality of manpower which could aid international competitiveness. Many countries therefore invest a rather large proportion of their country income into education, hoping to capitalize a better return in face of globalized competition in the future. Some educators also argue that there is another role of education, which applies mainly to adult and workers' education in its broad sense, that is to compensate for the failures of the formal education system and to support a variety of social movements attempting to redress social, economic, cultural and political disadvantage (Lovett, 1988). In fact, workers' education with a focus on basic skills and, for example, access courses, can ameliorate the problem of disadvantage. But for overcoming the inequalities built into society arguably, a more radical, challenging, transformative model of education – one in which working people are enabled to develop a critical political consciousness is needed. So, the study of workers education would therefore have social significance for the operation and development of the social structure.

Not all educators see the meeting of needs for workers, in terms of employability, as a desirable objective of education. While this may be important, it is also true that the education should extend the talents of people to venture new horizons rather than just confined to structural functionalism. These talents should be exploited fully with the goal not only of helping to maintain economic growth in the face of competition, but

also of providing each individual with a sense of control over her or his environment and a sense of having markedly increased individual options. Education is certainly a way to obtain the goal, but the opportunities available to workers for further learning depend on the structure and distribution of power in society. Those who are already well-qualified or in professional and managerial position tended to have, or able to afford, better opportunities to learn (Chan and Holford, 1994; National Households Education Surveys of the United States, 2001). However, for Jane Elizabeth Thompson, adult education is about helping people to acquire really useful knowledge. The people who most need really useful knowledge in Thompson's view are those who are denied access to the benefits of society and the levers of power: the disadvantaged, particularly the working class and especially working-class women (Thompson, 1997)

2.2 The Effects of Education on Employment in Hong Kong

To many teenagers, the potential power of social changes through education as proposed by Thompson might not be realized. These young learners might play more attention to their immediate need: employment. The Hong Kong Federation of Youth Groups conducted a survey on Hong Kong teenagers. The survey indicated that more than 50% of respondents looked for a job or a better future life as their aim of studying (The Hong Kong Federation of Youth Groups, 1999). These results may reflect the highly competitive nature of Hong Kong society, where people need to improve their knowledge and skills in various aspects for achieving a better life. Obtaining a good education is usually believed to be an effective means to improve one's living standard. Thus, it is understandable that quite a lot of young students believe the aim of studying is to secure a job or a better standard of living.

Previous discussion also highlighted the government's view of seeing education as an investment. In that case, if education is really a matter of producing the kind of outputs required by the society, planning for manpower will set the direction of education. As the graduates of the education system will be the workers of tomorrow, if the forecasting is wrong, these graduates might not fit the future market and the investment of education will be wasted. From the political point of view, unemployment is usually regarded as a threat to the stability of the society. It is therefore essential to keep a high employment rate. Graduates may have a higher employment opportunity if they are trained with proper skills demanded by the market. It is also important to consider that the students themselves also invest their time in receiving education. They have to make a decision while they are young yet the

decision could affect their future.

In Hong Kong, education up to a certain degree is compulsory: a complex social system in which everyone is required to participate. You can avoid the law all your life, hardly ever go to a doctor and never bother with psychologists, but you have only to reach the age of 6, or thereabouts, to merit compulsory treatment by educators. Education is the social science with clout: the non-voluntary intervention. This unparalleled call on the time and efforts of the youth places education in a position of great responsibility. Educators have more opportunities than other professionals to have enormous influence on the next generation. It is considered not ethical if schools market to these students in order to keep the school running rather than to serve for the best interest of the students. Education is therefore an economical, political and ethical investment.

The workers in Hong Kong are facing enormous challenges as the unemployment rate has been increasing over the years. The restructuring of the economy, namely the shift from secondary to tertiary-based industries, coupled with the competition of cheaper supply of labour from Mainland China intensifies the problems facing the workers. The current economic transition has hit hard at the work force which is comprised of around 600 to 700 thousands low education level, low skilled level or higher aged people (HKFTU Monthly Digest, May 2001). Among these figures, there are already more than 259,000 people being unemployed, or unemployment rate at 7.4%, in October, 2002 (Census and Statistics Department, 2002).

In the Government's Manpower Projection Report (2000), out of 170,000 unemployed persons, about 50% have lower secondary and below education. It therefore suggested that higher education attainment tended to have a correlation with secure employment (Report on Manpower Projection to 2005, 2000). International comparisons also suggest that Hong Kong is among the highest in terms of rate of return for higher education (Psacharopoulos, 1994). In general, tertiary education not only provides a passport of job security, but also a higher financial return with good social status. It is probably the reason that parents, including those from the working classes, expect that their children to reach at least the university level (Lau, Lee, Wan and Wong, 1991). It is their hope to assist their children to advance up the social ladder through education. In other words, the education demanded most by the workers is education for their children, not for themselves, and the type of education is education that comes with a degree. Most primary and secondary pupils themselves would also like to progress into higher education, especially university degree courses (Wong, 1997). Based on

the expectations from both the parents and the pupils, the direction of higher education would have a pivotal role for other education sectors. The above observations might explain why there is a high competition for the limited places of tertiary education in Hong Kong and that other educational routes, such as vocational education, tend to be regarded as a second choice from the students. People might be discouraged to enroll in sub-degree or vocational programmes, not because of the quality or career prospects of the training programmes but because of the mentality of worshipping degrees.

In countries like Germany, United Kingdom and United States that have a longer history of expansion of higher education, a degree holder is quite common: Having a degree may not be so special and is not necessarily carrying a higher social symbol. Education attainment may be more valued against its career implication instead of such an academic qualification. Under such situation, vocational education with a good career prospect may be more popular as compared to a degree programme with no employment prospect.

In Hong Kong, mostly because of their initial lower salary nature and the lack of bridging routes to other degree courses, parents and students would then regard technical and vocational training as a dead-end route for academic and career advancement. Immediate employability might not be attractive enough to forfeit the higher social status and options associated to a higher degree. The very small number of articulation programmes for degree courses offered by the Vocational Training Council (VTC) fuelled up its image as the 2nd choice option.

As the local universities operate the degree courses in Hong Kong, any articulation programmes for the graduates of the VTC to pursue further for a degree must require the joint-efforts from the local universities. The small number of articulation programmes for the graduates of the VTC could be related to the reluctance of cooperation from the local universities (Chan, 2001). The situation might change as the number of university has increased over the past ten years and the universities may start competing for intake among them. At present, vocational education however remains to be the 2nd choice for many students.

University is thus the first choice of the general public. Unfortunately, for the underprivileged students, there are the effects of cultural capital in Hong Kong. The competitive battle for tertiary positions is far from an equal playing field (Mitchell, 1972; Ng, 1975; Brimer and Griffin, 1985; Pong and Post, 1991; Tsang, 1993). Most

past efforts to ensure equity in education have been procedural rather than substantive. Universities mostly depend on examination result for entry criteria and yet, for many students, the examination result is the accumulation of cultural capital in terms of family background, knowledge and social resources. For example, some families move their house to the neighborhood of famous secondary schools so that their children have a higher chance to be assigned to the famous secondary school through the computer allocation of school places under the government system. Those who cannot afford to live in good school districts would have to be totally dependent on the students studying effort. Some parents do not understand the allocation system and provides virtually no advises to their children on how to make the best outcome from the system. On the other hand, many parents who can afford additional resources could hire educational advisers for their children on not only how to study but also strategies to secure places in good schools or even university entrance. In a way it is not possible to legislate equity completely. Ideally it is also necessary to eliminate the barriers to equity, so that educational equity means not only equal access but also equal ability to participate.

Hong Kong has gone through a rapid expansion of quantity in both the primary education and secondary school system, following the implementation of the nine-year compulsory education system in 1978, and the higher education in 1989. Since then, there was a change that turned the profile of the education attainment from a tall thin pyramid with a few privileged groups at the top to a form that was more pear shaped with an increasing large middle. The education since the late 1980s is therefore no longer an elite system. There is however no sign that the degree-centered perception of the general public is changing. There might in fact be an over supply of university graduates and, if the trend continues, there will be a decrease of potential income for the graduates due to the shift of manpower balance to the supply from the demand side.

Hong Kong up to the present moment has had a traditional emphasis on higher education. The expenditure per pupil as a percentage of GNP per capita in 1996 for tertiary education, secondary education and Pre-primary/primary were 54, 13 and 6 respectively (UNESCO, 2000). From the financial investment perspective, the return from the time and money investment on a university graduate is not particularly lucrative. If education is viewed as investment of human capital, the investment portfolio might not be too profitable. According to the data in the United States, there appears to be an over supply of degree holders to the year 2007 (table 2.1). The situations might also apply to other developed countries.

	Supply	Demand	Education Attainment Level Higher than Work Demands (%)
Professionals	79,300	58,200	27%
PhD holders	47,900	46,000	3%
Master holders	450,000	43,000	90%
Degree holders	1,268,000	734,000	43%

Table 2.1: Manpower projections to the year 2007 (Source of data: Monthly Labour Review, November 1997).

In Hong Kong, the recent trend of expansion in tertiary education suggests that as the number of university graduates increased over the past few years, a university degree is no longer a guarantee to employment. In fact there are signs of over-qualifications of many job-holders. Secondary data from industry indicate that many employers emphasize on IT knowledge and skills; language proficiency, management skills, international trade practices, multiple skills for the discharge of multiple tasks, creativity and flexibility rather than mere academic qualifications (Report on Manpower Projection to 2005, 2000, p.48). It is therefore important for the parents to re-think about the best strategies for their children.

On the other hand, workers with a degree remain desirable as compared to non-degree workers. In particular, a surge in demand is expected for workers with degree education, to cater for the job requirements of professionals and associate professionals in the various business services. Likewise, a strong demand is envisaged for workers with post-secondary education, mainly to meet the job requirements of associate professionals especially in construction, the import/export trade, and insurance. Yet this is expected to be counter-balanced by a decrease in demand for workers with upper secondary education in the import/export trade and in the various financial and business services, mainly due to reduced job opportunities for clerks. Workers with lower secondary education and below are also expected to find it harder to obtain jobs as plant and machine operators and assemblers, due to reduced job opportunities in such manufacturing industries such as textiles and wearing apparel, and printing and publishing (Report on Manpower Projection to 2005, p. iii).

Such shifts in the sectoral pattern of employment and the relatively large numbers in the Hong Kong are not unique. Such pattern also has its effects in the European Union (EU). More workers in the EU are now employed in advanced service activities, as well as in the more high-tech parts of manufacturing. The increasing demand of the knowledge levels on workers has important implications for the education levels

required of the workforce (Cedefop, 2000, p. 39). In addition, it seems that people who succeed in attaining a high level of education are, in most countries, significantly better placed to get a job than those with a lower level (as well as getting a highly paid job). For example, in the EU, an average of only 80% of men between the ages of 25 and 54 with no education or vocational training beyond basic education (compulsory lower secondary level schooling) were in employment in 1997. This compared with over 86% of those with upper secondary level education and over 91% of those with tertiary education (a university degree or equivalent) (Cedefop, 2000, p.39).

Many studies have indeed shown a correlation between education and economic growth, which in turn can be linked to the concept of human capital. However, correlation is not the same as causation, and in some cases expansion of education has come because of expanded growth rather than the other way round (Morris and Sweating, 1995). Also, one cannot assume that an increase in education will automatically increase incomes. If not properly planned with considerations of other factors, investments in education may be a waste of money; and in some societies expansion of education has led to “qualification inflation” in which the same jobs are done, not necessarily better, by people with higher qualifications than before (Dore, 1978; Little, 1992). Besides, with more workers having higher qualifications, ordinary degree holders are regarded as “educated” but not “better educated”. It is the types or fields of studies that counts. For example, holders of Higher Diploma of Pharmaceutical Technology, a programme operated by the Hong Kong Institute of Vocational Education, enjoy on the average a higher salary in their first year of employment than the average salary of a corresponding degree holder (in-house survey as conducted by the Hong Kong Institute of Vocational Education, 2002).

2.3 Summary of the Chapter

This Chapter establishes that education is generally regarded as a mean of upward social mobility, or at least to secure employment. The HKFTU, being the biggest trade unions in Hong Kong already incorporated education services as part of its service duties to advance the affairs of its union members. Following the changeover in 1997, The HKFTU is increasingly influential at the policy level in Hong Kong and is therefore possible to exert its ideals on education that it has not been able to have such an extent of influence before.

The types and direction of education that is required by the workers were discussed. There were different views from various education scholars: ranging from skill-based

training for better employability to self-awareness for social changes.

In Hong Kong, employability remains to be the key concern both from the workers' and the government's points of view. It appears that although there is a sign of qualification inflation, higher education attainment remains to be a proxy of success in terms of employment security. Education providers for workers' education may have to consider this impact and provide education training that not only provides vocational values but also a recognizable qualification as an index of education attainment.

Regarding to self-awareness for social changes, the objectives of the various education providers might be different. Theoretically, trade union involvement in education and training should be premised on the best interests of their members. While these interests may overlap with those of individual enterprises and the government, they are not identical. Individual enterprise and the Government may view education or training as an investment of manpower for a future financial return, discussions involving trade unions around education activities embody a view of social change in which the workers are seen not as the passive responds of market forces but as active members capable of positioning themselves in relation to the various forces of the environment. The educational views of the trade unions in Hong Kong will be explored in Chapter 7 by interviewing the leaders of the HKFTU.

The main purpose of the thesis is to investigate how the HKFTU responds to the issues mentioned above at present and how it should in the future. This will be investigated in a number of ways in particular by collecting empirical data and that the following chapter will explain in more detail the methods of investigation used.

Chapter 3 Methodology

The methodology adopted for this study is based on a combination of qualitative and quantitative approaches to assessing the opinions of various stakeholders of the education system on what to be expected from the education system in Hong Kong in order to achieve a broad but representative picture of the factors for the development HKFTU's education service. The methods followed were:

- a) a review of the development of workers' education in Hong Kong, the Government's attitude towards education and HKFTU's role in the development (Chapter 4 and 5). This is based on documents and secondary literature: which includes analysis of original documents (such as legislative debates, government policy documents, legislation, and position papers of non-governmental organisations), secondary analysis and scholarly literature. This part of the study brings in a necessary historical dimension to the study.
- b) telephone survey of people involved in lifelong learning (Chapter 6) to gain some indication of their views – their experience, hopes and expectations, about further learning;
- c) interviews with leaders in workers' education from HKFTU and representatives from the jurisdiction (Chapter 7). This element of the study enables us to explore the thinking of those with responsibility to promote lifelong learning. This is the group with great influence in this field. Their perceptions of their task are crucial to our understanding of how lifelong learning will develop in Hong Kong.

This qualitative and quantitative analysis should accomplish three goals: First, it should report the findings of a study of a subject population as well as provide an overview of the current literature and current findings on this subject. Second, it should interpret these facts based on a comparative reading of other sources. Third, the empirical research study must analyze the "trends in attitudes, events, and facts in terms of their commonality and potential for prediction" (Smith, 1997). In other words, the methodology of this study will enable a view to be taken of the future development of Lifelong learning in Hong Kong. The challenge is to use information from diverse sources of data to gain a more coherent picture of what shapes Lifelong learning opportunities for some groups of workers in Hong Kong. The data collected is not available from any other sources. It therefore supplements some of the official documents on Lifelong learning. More than that, however, it enables us to examine

official documents and policies from another angle. The underlying method of triangulation – relating different data sets to one another and reviewing evidence from different perspectives, enhances the usefulness of the discrete data sets involved.

Although most of the official records from the Hong Kong Government can be located from the Internet or the major libraries, especially the Hong Kong Collection Section from the Main Library of the University of Hong Kong, a large part of historical record on the contributions of HKFTU was missing from the official documents of the Hong Kong Government. It is perhaps due to the fact that in the pre-1997 period, the two major trade unions: the pro-China Hong Kong Federation of Trade Union (HKFTU) and the pro-Taiwan Trade Union Council (TUC) were regarded as politically sensitive: History of labour unions in Hong Kong extends to their pre-war background. Workers in Hong Kong were recruited under two the quasi mass organs for the rival Nationalist and Communist parties after their formal split as China's governing elite in 1926. Such a pervasive theme of its "politicization" persisted within the Hong Kong movement after the Second World War. In the wake of the resumed civil war in Mainland China and its liberation in 1949, the Hong Kong union movement was politically divided into polarized blocs between the pro-China and pro-Taiwan sectors. Such an ideologically dissected dualism in the labour movement was given its most "institutionalized" auspices when the two major trade union groups, yet with opposite affiliations, the left-winged HKFTU and the right-winged TUC were both established in the year of 1949 (the liberation year of Mainland China).

It is possible, but difficult to prove, that the Hong Kong Government being kept in the middle between the two politically polarised trade unions did not want to release any documentations indicating any favoritism. Official documents relating to the two trade unions were very limited and the policy positions of the government towards the two unions in the pre-1997 period would probably remains to be a permanent secret. In this context, historical data on the HKFTU involvement of Lifelong learning was also limited. The interviews with the union leaders might therefore supplement part of the missing history.

In addition, the official documents released by the government, usually position the government in a favourable angle and may be biased. This further strengthens the argument that additional information must be collected other than from the government source.

A key thread running through this analysis is the need to relate data about attitudes and expectations of individuals (in this case adult learners) to the contexts in which those attitudes were formed and the policy frameworks designed to change them. Lifelong learning is justified in part as a way of providing learning opportunities for those who were denied them in their compulsory schooling. The detailed arrangements of the research methods, which examine the adult learners through telephone survey and the views of the trade union leaders through face-to-face interviews, will be illustrated in following paragraphs.

3.1 Workers' Education in Hong Kong

It is necessary to understand the context of Hong Kong's education system and worker's education (the context that HKFTU's education service has been worked in) to be able to analyze and interpret the data. A range of factors have been interacting and influencing the development of workers education, hence lifelong learning. They include: a) Long term structural changes in the social and economic life of Hong Kong; b) Changes in the prevailing discourse of lifelong learning in Hong Kong; c) The experience of HKFTU's in providing educational opportunities for workers; and d) the Impact of globalization on Hong Kong society and education. A review of the literature about education and development, in chapters 4 and 5, gives a more concrete picture for the development of this thesis and the propositions it contains.

The key point is this: history exerts itself on the present. The structures, resources, attitudes and policies that shape adult education opportunities and therefore workers in Hong Kong have to be understood in the light of their history.

Hong Kong is particularly interesting because, since 1997, history has taken a new turn, opening up entirely new prospects for lifelong learning. All the key players need now to review their past experience and examine afresh the needs, interests and expectations of different constituencies of learners. It is vital to trace how the different groups involved are doing this. This is why it is vital to examine historical materials and contemporary policy documents, together with public debates about learning. For it is in this body of writing that we can see the way different interest groups define the meaning of education in Hong Kong. It is also possible to trace which groups have been decisive in their influence.

3.2 Telephone Survey of people engaged in Continuing Education

In chapter six, the profile of the consumers of continuing education will be studied. This is a crucial data set and one that needs to be checked and re-checked as time passes, for attitudes and expectations change. People make rather complex decisions about whether to engage in learning or not. Those decisions are related not only to calculations about their job prospects but also to how they view their past educational careers. It is therefore necessary to explore these questions with particular constituencies of learning and in particular places at particular points in time. The consumers are commonly referred to as adult learners or participants in continuing or further education. For comparison purposes, the survey was organized by following the same approach as the telephone survey conducted by the University of Hong Kong in 1991 (Chan and Holford, 1994). The questionnaire of the survey (Appendix I) was also directly derived from the 1991 study.

The areas of investigation were:

1. the demographic background of the participants in continuing education (Section I: Questions 1 to 3 and Section VII: Questions 1- 3 in Appendix I)
2. the participation rates of different groups of learners varying according to age, educational level (Section II, Questions 1 to 2, as tabulated against Section I: Questions 1 –3 and Section VII: Questions 2 in Appendix I)
3. the nature of the courses attended in terms of teaching methodology, cost, providers (Section II: Question 2 in Appendix I)
4. the reasons for (motivation) and against (deterrent) participation in continuing education (Section III: Questions 1 to 2 and all questions in Section IV in Appendix I)

In the context of this study, continuing education was defined as part-time and post-initial education and training. It included, among other forms of provision, in-house training and extra-mural courses. Standard Public Opinion Program sampling procedures initially developed by the Social Sciences Research Centre of the University of Hong Kong were adopted (as illustrated by the survey report from The Hong Kong Federation of Youth Groups in 1999): Telephone numbers were first randomly selected from the telephone directories as seed numbers. Subsequently, by employing the plus/minus single digit method, additional numbers were generated from seed numbers to capture possible unlisted numbers. All numbers were then mixed at random to give the final telephone sample (The Hong Kong Federation of

Youth Groups, 1999).

The survey was carried out by the author with the support of the final year students of the Higher Diploma in Pharmaceutical Technology from the Institute of Vocational Education (Chai Wan) in the year 2001. Before the actual survey, a pilot study of 50 cases was conducted to examine the appropriateness of the questionnaire and the practicality of using telephone interviews as the survey method. The pilot survey suggested only minor revisions to the questionnaire. The data from the pilot survey was not included in the analysis of the main survey. The survey was then conducted in October 2001 and 432 successful interviews were completed.

Once data from the telephone survey had been collected, the next stage involved coding and scoring them. Coding has been defined by Kerlinger as the translation of question responses and respondent information to specific categories for the purposes of analysis (Kerlinger, 1970). As most of the questions were closed-ended, it was therefore relatively simple for coding. The coded data collected were then tabulated and cross-tabulated to reveal if there were any general profiles of the participants on continuing education.

There are certain advantages of adopting the method of Chan and Holford's method for the telephone survey; Firstly the data can be compared directly with the data collected by Chan and Holford about 10 years ago. The comparison may therefore reveal possible changes for the past ten years in terms of people perception and behaviour towards continuing education. Secondly, by adopting the instrument from other authors, the survey can be carried out with a smaller scale of pilot study, as the practicality of the method are at least documented and tested previously. The practicality of the instrument also relates to its ease of use by the other researchers. By providing the full questionnaire by Chan and Holford, the instrument is readily available for immediate application.

Unfortunately there are also drawbacks of using the existing survey method. There is no direct control on who is answering the telephone call. Without observation of the body language, the only information collected is the answer of the respondent that has to be taken and analyzed at its "face value". The questionnaire, by using closed-end multiple-choice questions, tends to limit the freedom of expression. The option answers of the multiple-choice questions are again not exhaustive. Taking examples

from the option answers of the deterrent factors, the choices of answers center on technical issues (Not enough time, Inconvenient meeting places, Taking care of family etc), and there is no choice on psychological issues that may carry a “bad” impression (such as laziness, don’t bother to learn, not capable to learn etc). Respondents may use the technical deterrent factors provided by the questionnaire to explain their lack of participation in continuing education and hide away their real reason of not to participate. There is a tendency of mixing up reasons with excuses. The outcome would be an instrumental error of overestimating the effects of technical deterrent factors. There is therefore a trade off in using the existing instrument, for exploring the deterrent factors that are more related to attitudes and values.

The major defect of this method is of course the limitation of the freedom of expression, induced by the pre-set multiple-choice type questions and answers. Yet the responses collected provided an angle of insight into the participants on their attitudes towards continuing education. For example, the possible deterrents and motivation factors of continuing education were preliminary investigated by this telephone survey. These deterrent and motivation elements were then reiterated, but in different manner, in the open-ended interviews with the trade union leaders.

3.3 Interviews With the Trade Union Leaders: Workers’ Education Services of Hong Kong Federation of Trade Unions

Having looked into the data and opinions of the consumers, it is now time to hear from the leaders and policy makers. They are the agents of change. Their perceptions shape policy development and resource distribution. It is crucial therefore to understand how they approach the issues of continuing education. They can be understood as a group (not always cohesive or in agreement with one another) who interpret the lifelong learning discourse and translate it into practice.

The union leaders of HKFTU were all influential persons and, understandably, rather busy. It was understood that not many people could engage all of them for a full interviews that covered several days of their time. The gatekeeper problems were solved gradually by building up long-term trust and friendship through volunteering works for several years since 1996. The purpose of the interview were explained in detail and, in order to convince the leaders for a full participation, the Chairman of HKFTU, Mr. Cheng Yiu-Tong, was interviewed first. With the full support of Mr. Cheng, the other leaders tended to agree early for their share of interview.

Interviewing questions were asked in order to collect their opinions on different aspects of workers' education. The questions asked in the interviews were largely open-ended. One of the problems thus appeared was that of developing a satisfactory method of recording replies. One way is to summarise responses in the course of the interview. This method was not used as it has the disadvantage of breaking the continuity of the interview and may result in bias because the interviewer may unconsciously emphasize responses that agree with the interviewer's own expectation. The interviews were conducted therefore by recording all the responses by a tape recorder and all the materials could then be referenced by the voice record.

The interviews were conducted in Cantonese (the most common Chinese dialect in Hong Kong) in order to facilitate free exchange of ideas. The tape records were then transcribed into English for further analysis. For the purposes of data analysis, it is necessary to transcribe the Cantonese verbal data into a written format in English. The transcription process on the other hand potentially introduced additional errors into the data analysis.

In order to safe guard the accuracy of the data, the interview transcripts, in the English format, were sent back to the interviewees within one week for approval. The interviewer also indicated the availability of the tape records for clarification and double-checking if needed. All the English transcriptions were acceptable by the interviewees as fair and true record of their ideas before using for further data analysis.

The questions were designed under the instruments of SWOT (Strength, Weakness, Opportunity, Threat), PEST (Political, Economic, Sociological, Technological), and Pareto analysis. Finch (1994) describes a business perspective of quality measurement in quality organizations with the use of several measurement techniques. These instruments had been found effective in quality and performance analysis. Moreover, these instruments analyze comprehensively an organization in terms of its internal strengths and weaknesses; as well as external opportunities and threats; impacts from changes in macro-environment and; potential and major root causes of problems and obstacles. Face to face interviews were conducted to draw opinions from the leaders of workers education.

The interviewing targets covered both thinkers and doers. They included the key persons of HKFTU including Mr. CHENG Yiu-Tong (Chairman of Hong Kong Federation of Trade Unions (HKFTU); Executive Council Member). Ms. CHAN

Yuen-Han (Vice-chairman of HKFTU; Legislative Council Member; Chairperson of the Education Advancement Society for Workers in Hong Kong and Kowloon (EASW)) and Mr. LEUNG Kai-Lik (Director of HKFTU Spare-time Study Centre). Moreover, three other persons who have been involving in the field of workers' education were interviewed to obtain opinions from other perspectives. One of them was Mr. TAM Yiu-Chung (Vice Chairman of HKFTU; Legislative Council Member; Chairman of Employees Retraining Board; Chairman of Clerical and Professional Employees Association). The Employees Retraining Board (ERB) is an independent statutory body set up in 1992 funded by Employees Retraining Fund established by the government. The ERB's functions are to provide retraining to eligible workers to assist them in taking on new or enhanced skills so that they can adjust to changes in the economic environment. Mr. CHAN Cheuk-Hay (Principal of Hong Kong College of Technology) was also interviewed. Hong Kong College of Technology (HKCT), originally a workers night school, was established by the Education Advancement Society for Workers in Hong Kong and Kowloon in 1957. It played an important role in workers education in the 50s and 60s by providing learning opportunities to workers. HKCT is a non-profit distributing self-finance institution and is now a leader in non-mainstream education that provides diversified and multi-disciplinary professional programmes. Mr. WU Tat (Advisor to the Hong Kong Construction Industry Employees General Union) was another person interviewed. Mr. Wu was a construction worker himself and he is now retired. He has been involving in and dedicated himself to advocacy of workers' training. He was a pioneer in his time to advocate and organize structured training instead of apprenticeship in the workers' training in the construction industry. Mr. WU provided insightful opinions from a more working class perspective. Permissions were granted from the interviewees to quote their comments before the start of each interview and repeatedly asked for the permission when sensitive issue was raised. They all gave permission for their names to be used and did not require anonymity.

SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis is an effective method of identifying an organization's internal operational, resource and organizational strengths and weaknesses as well as key external opportunities and threats (Dibb & Simkin, 2001). It also helps to identify the greatest potential for growth by reinforcing the strengths while addressing the weaknesses and threats. PEST (Political, Economic, Social, Technological) analysis is particularly effective in analyzing macro-environment in which the organization is. These macro-environmental factors usually are beyond an organization's control while changes in the external environment also create new opportunities.

Pareto analysis focuses on the identification of trouble spots in process and quality analysis (Fryman, 2002). Pareto analysis helps to determine what the priority of contributing causes to the problems may be. The Pareto Principle states that only a “vital few” factors are responsible for producing most of the problems. It helps to identify the largest contributors of variation that result in poor performance (Fryman, 2002). In this study, the leaders’ opinions about the major obstacles of workers’ education will be obtained and analyzed. Questions derived from these instruments are used to prepare a set of questions to be asked to the interviewees (Appendix II).

Each interview was recorded in Chinese, translated and presented in Appendix II, with interviewer’s comment illustrated in *italic* form. The information received was analyzed and discussed in latter part of Chapter seven and integrated with the other findings in Chapter eight. The analytical method employed consisted of individual analysis using individual data classified under the micro factors like SWOT and the macro-factors of PEST. Following the individual data analysis, the themes identified individually were compared to the other leaders as a group to identified whether there were common themes. Such comparison is part of “combined levels of triangulation” as described by Denzin in 1970.

The interview with Mr. Cheng Yiu-Tong was a little different from others. The reason was Mr. Cheng's focus on more macro perspective of HKFTU's education service as the chairman of HKFTU.

3.4 Strengths and Weaknesses of the Methods

There were limitations in this thesis and the methods chosen. As this thesis studied both micro and macro perspectives of workers’ education and involved various stakeholders, the results generated were broad when compare with what a specific study with one of the stakeholders would generate. Besides, the interviewees may respond to a question in such a way as to show themselves in a good light; or to response in such a way to anticipate what he interviewer wants to hear. These problems may appear in both the telephone survey and the face to face interviews with the union leaders. There is chance that information obtained would require more interpretation.

Nevertheless, despite these limitations, the data collected provide a way to gain insight into the needs and interests of learners and to understand the complexity of the

changes taking place in Hong Kong society. When these different data sets are triangulated (Denzin 1970), a composite – though changing – picture emerges. What is happening in Hong Kong is, of course, unique. The framework of this study allows for such comparisons to be made, however, and in so doing makes a contribution to a wider international discourse about continuing education and lifelong learning. The methods used here provide for an understanding of how historical, contextual and social-psychological factors interact to shape both educational policies and attitudes to learning.

Chapter 4 Present Limitations of Workers' Education

To understand the constraints on the development of education opportunities for workers in Hong Kong, it is vital to appreciate the ways in which Hong Kong education has been resourced and managed. In both the colonial period and since, the system has been controlled from the center and has been more responsive to the needs of Hong Kong as these are perceived by Government and much less so to the needs, hopes, expectations of working class people. They have few means available to articulate their needs and interests within the structures of governance of Hong Kong. Put differently, they have been powerless to shape education policies.

On the other hand, changing social expectations, migrations from China and new political aspirations have injected into Hong Kong education politics a new dynamic that government cannot directly control. To understand the changing frameworks of workers' education, this structure of governance has to be analysed.

4.1 Government and the Education System

In the book *A Phoenix Transformed: The Reconstruction of Education in Post-War Hong Kong*, Anthony Sweeting (1993) provided a comprehensive overview of the development of Hong Kong's education. The post-war period refers to the decade following the end of the Second World War. Education has gone through lots of changes and reforms since the post-war period. Nevertheless, the focus here will be on the recent decades of education development, and draw on Sweeting's analysis.

Hong Kong was a British colony before 1st July 1997. Before 1997, the Governor of Hong Kong was by law the sole policymaker in Hong Kong, appointed by the Queen of Britain. Education was no exception. The Governor was advised by the Executive Council (Exco) in making decisions. The Governor according to his choice appointed members of the Exco. Within the government, the Education and Manpower Branch, a policy branch headed by the Secretary for Education and Manpower, handled educational policy matters.

On the other hand, the Governor usually conducted extensive consultation on education policy before reaching a decision. The policy would then combine ideas and arguments from the various interested groups before it was finalised. The respective policy-advisory bodies advised policies in various sectors of education. Members of these bodies were usually appointed by the government and consisted of

prominent figures of the relevant fields. The government decision-makers and advisory bodies were by no means the only actors in educational policymaking. They were only the official players in educational policymaking. In addition, there were organised groups of educators, who were involved in an extensive network of policy consultation in all sectors and at all levels of education. Such consultation usually took place in consultative committees which were either standing or ad hoc in nature. Increasingly, organised educator groups and education sectors of political parties initiated contacts with government departments or legislative councilors to express their opinions upon policies.

Although there have been considerable amount of education reforms initiated by the government after 1997 (Tse, 2000), the structure and system remain pretty much the same.

Schooling in Hong Kong became compulsory for nine years (from Primary 1 to 6 and Secondary 1 to 3) in 1978 in response to criticism by the European Economic Community about the prevalence of child labour here, which kept the prices of goods lower than those of Hong Kong's European competitors (Postiglione et al., 1997). In general, the government provides nine years of free and universal basic education from the age of 6 to 15. After three-year basic secondary education, most secondary schools offer two-year senior secondary courses leading to the Hong Kong Certificate of Education Examination (HKCEE), to be followed by a two-year sixth-form course leading to the Hong Kong Advanced Level Examination for admission to tertiary institutions (HKSAR, 2003). Hong Kong now has 11 degree-awarding higher education institutions, eight of which are funded through the University Grant Committee (UGC). Seven of the eight are comprehensive universities and the remaining one is a teacher training university. In the fact sheet on education (HKSAR, 2003) issued by the government, vocational, post-secondary and continuing education are grouped together as in one category. This reflects partly how the government views continuing education. There is a statutory body, the Vocational Training Council (VTC), which advises the Government on measures required to ensure a comprehensive system of vocational education and training suited to the developing needs of Hong Kong. It also institutes, develops and operates schemes for training operatives, craftsmen, technicians and technologists to sustain and improve industry, commerce and services. The VTC also establishes, operates and maintains the Hong Kong Institute of Vocational Education (IVE), industrial training and development centres and skills centres. It also administers the Apprenticeship Ordinance.

The tertiary education of Hong Kong previously tended to be regarded as an elite system, mainly to serve as a means of providing the civil service in particular, and increasingly certain professionals and industry, with highly able English-speaking graduates. Seemingly, the most cost-effective way of doing this was to teach a highly academic curriculum in the medium of English, with progress periodically barred by a series of norm-referenced, or competitive, examinations (Biggs, 1993). The number of students required in such a system was not large and there was no need to expand the services to the majority of the people. The relatively low number required could be related to the industrial need of the society. Hong Kong at the early stage of the colonial period was only a fishing port. People mainly worked as labourers on mostly manual and non-technical types of job. However, since the mid 1980s, Hong Kong has undergone a massive transformation as it established itself as one of the foremost trading and financial centres in the world, and evolving also to a service-based economy, it was quickly realized that in order to maintain such a position, significant developments in its higher education were required. Combining these factors together with the need to replace the highly educated professionals who emigrated in 1989 due to apprehension about Hong Kong's development after the return of sovereignty to the People's Republic of China (PRC), the Hong Kong Government expanded higher education.

The government funds almost all of the tertiary institutions and most of the primary and secondary schools in Hong Kong, in both the colonial and post-1997 periods. In other words, they are financially dependent on the resources allocation policy of the government and they are therefore relatively shielded from the direct impact of market forces. Taking away the impact of the market forces, the government remains the major factor in formulating the educational policy.

The executive decision of the government, at least in the colonial period, set the tune of the education policy, whereas the resources allocation system served as the tools to implement the policy.

4.2 Functions of Education and the Attitudes of the Government before 1997

Government policies shape the larger environment in which schools operate, teachers teach and students learn. Hence government policies do play a significant part in education and are therefore worth special study. What happens in schools, in

classrooms or even in families is also related to learning and the development of young people, but they are not always part of government policies. However, government remains the major player in directing the development of education. It is therefore important to understand any purposes and theories that the Hong Kong government adopted in establishing the education policy in Hong Kong.

Without claiming that Hong Kong educational planners approached their work in the light of any particular sociological theory, it is nevertheless possible that policies in this field were designed to reproduce the social and economic order of Hong Kong society (Postiglione, 1997; Mitchell, 1972).

Althusser (1972) argued that the school serves to shape students to fit with the requirements of capitalism, they learn submission, deference and respect for the established organisation of work and their place in it. The school also works to ensure that the labour force is technically competent. Such analysis has placed the ideological aspects of education within a broader framework that focuses upon the necessity of the reproduction of the conditions of production in capitalist society. That is to say, both the physical means of production, raw materials, machinery, transport, etc., must be produced and labour power must be reproduced if capitalist production is to continue.

In Hong Kong as a colonized society, at least before 1997, utilitarianism in terms of financial or political gain dominated the agenda of the government. It was important to reproduce a system to ensure profitability. Education in this case, was the means of reproduction. The general attitude of the public is to focus on economic, rather than politic matters and is in line with the utilitarianism agenda of the government. The next section further argues that the government tended to view education as a mean of social engineering. Even though the government may not have a clear philosophy to follow, their directions of the engineering are in line with the phenomena as described by structural functionalism and Marxism.

4.3 Using Education for Social Engineering, Investment and Management

The history of Hong Kong inherited a potential conflict between the government and the local people. As in other colonial experiences, the colonisers tried to influence the value systems of the colonised through education (Clignet, 1991).

There is an expectation that the school curriculum should perform a major role in explicitly promoting a national character and identity. The promotion of national identity and an essentially Confucian set of moral values such as loyalty and patriotism are central goals of school curricula in the People's Republic of China (PRC), Singapore, Korea, Japan, Taiwan, and to a much lesser extent in Hong Kong (Marsh and Morris, 1991). The lesser extent of emphasis on nationality is understandable. A strong sense of nationality is usually a sensitive issue in a colonised society. One of the feature of Hong Kong society which could be viewed as a partial manifestation of the school curriculum is the lack of clarity about national and cultural identity. The colonial government, through their influences on curriculum, intervene in the syllabus by taking away areas that might be politically sensitive (Clignet, 1991; Morris and Sweeting, 1991).

It was suggested before that the interest of the colonial government might be mainly in economic benefits, and the education system preferred by the government would be one that produces competent business people with few political ambitions. This perhaps explains the emergence of a Hong Kong psyche which has been described as "utilitarianistic familism," (Lau, 1982). The essential features of this attitude stress a social psychology which focuses on the pursuit of self and family interests and a relative lack of concern for broader communal and national concerns. The Hong Kong approach was important for the colonial government to maintain social stability as it would channel the energy of the public to economic targets rather than to pursue political gains.

After the handover of sovereignty to China in July 1997, the role of education might be changed and it is yet too early to predict the attitudes of government towards education. There are however some indications that education in Hong Kong will continue to enjoy a high priority in the government's agenda. According to the inauguration speech of the Chief Executive of the Hong Kong Special Administrative Region, Mr. Tung Chee-Hwa, education, housing, economic conditions and social services are the four major aspects for improvement.

The education policy of Hong Kong will aim at improving the quality and standard of basic education by employing teachers with at least a University degree and teacher training to teach in primary and secondary schools. The future economic development of Hong Kong is seen as relying strongly on the support of a well-educated younger generation (Tung, 1997). Mr. Tung's statement implies that the new government will continue to view education as primarily an economic investment.

If the society views one of the major roles of education to be the production of a labour force, education could then be evaluated through the concept of added values in terms of training of human capital.

The mentality of regarding education as an financial investment was demonstrable through the government statement: Referring to the Education Commission Report No. 5, it says: “We see education spending as an investment, and we believe the community shares this view. If resources are invested wisely within a well-managed education system, the social and economic returns for both individuals and the community can be substantial, as Hong Kong’s recent history has shown.” (Education Commission, 1992).

Considering the view of the Education Commission, which focuses on financial investment as above, the government must have thought investment in pre-school levels is not lucrative. Pre-school education in Hong Kong starts at the ages of three or four. Pre-school education is provided in either kindergartens or nurseries. Children may go to kindergartens, which are meant for children for ages from four to six. Almost all kindergartens in Hong Kong are private, though they are under the control of the government Education Department. Nurseries are usually not regarded as a part of the main education system and they are under the control of the government Social Welfare Department. Until 1994, the government policy towards pre-school education was based on the assessment that pre-school education is ‘desirable but not essential’ and hence government participation is minimal (BOE, 1994). The idea was that the maturity term is too long for investment in pre-school education, whereas return of investment in tertiary education is more immediate. Besides, the “less capable” students could already be eliminated during the selection process before they could enter universities. Investment to the remaining “bright” students of the universities, as demonstrated by Psacharopoulos in 1994, appears to be more financially efficient, at least in Hong Kong context.

If the whole education is based on the concept of profitability in financial terms, it will be fairly easy to analyze and predict the social function of the Hong Kong education system. What is required, are simple financial statements with profit and loss data. As mentioned earlier, colonial governments usually stress economic and political benefits. This however must be achieved in a potentially volatile environment where there is a potential conflict between the governed: people with Chinese culture, and the government: a British Colonial government. In order to

reduce the conflict, government might make educational policy that has no immediate financial gain. Yet the policy would serve to satisfy the demand and expectation of the society.

Hong Kong's gross domestic product (GDP) grew rapidly since the 1950s. It was only HKD2,519 per capita in 1964 and it became HKD187,748 per capita in 2001 (Lo, 1992; Hong Kong Year Book, 2001). The population of Hong Kong increased rapidly at an average rate of one million people per decade. It was approximately 2 million at 1951 and it became 6.79 million at 2001 (Hong Kong Year Book, 2001). The birth rate in Hong Kong is low but the influx of people from Mainland China has always been the main cause for rapid population growth. The increase in wealth and number of Hong Kong citizens imposed certain demand on the education system. The expansion of primary education was clearly influenced by the rapid increase of school-age children from Mainland China (Wong, 1997). This is a social demand rather than a financial decision. The shortage of educational resources after the war caused the primary schools in Hong Kong to divide into morning session schools and afternoon session schools with class sizes that often exceeded 50 students. With the growing in size and public demand, free and compulsory education for the 6-11 age group was introduced from 1971. Later, it was expanded to 9-year free and compulsory education for the 6-14 age group in 1978 thus beginning the expansion of secondary education. In a way, the move would reduce the nature of the conflicts and it could not be explained simply by financial terms. Education is therefore affected not only by past social transformation, but also by expectations of people about their future (Church, 1976).

Hong Kong people are beginning to have higher expectations of what schools can and should do. Although maintaining the ideology that success in school and society are dependent on ability and hard work, Hong Kong people have begun to demand more choice in education and have taken a more interventionist view of the role of government to ensure fair educational opportunities.

4.4 Limitations of the Education System to Meet the Workers' Demands

As discussed earlier, education could be used to provide labour to keep the capitalism running. In a sense, proper education is a guarantee of future employment and a chance of advancing social status. Among the 6.79 million people in Hong Kong over 95% are Chinese and almost half of them were born in China (Hong Kong Year Book,

2001). During the past few decades continued migration of Chinese from Mainland China to Hong Kong increased the population and provided manpower. The number of workers at that period jumped several folds. The experience of settling for these new coming workers in Hong Kong was not smooth and their initial hardships in settling in Hong Kong inspired their expectations of high educational achievement for their children (Wong, 1997). Commonly parents in Hong Kong expect their children to achieve at least university education (Lau, Lee, Wan and Wong, 1991). These aspirations also reflect traditional Confucian thinking which places a high value on education. It was suggested that the Chinese in Hong Kong have developed an attitude in which economics are clearly distinguished from politics. The capitalist system is practiced (Lau, 1982). Working parents and the general public therefore demand the government to allocate more resources to education.

The elite tertiary educational system of the past could not accommodate the increasing demand of tertiary education for the workers. The development of tertiary education in Hong Kong only commenced in the 1950s. The only university at that time was the Hong Kong University and it was allowed to have greater autonomy under the legislation of the University Ordinance after 1958 (Hong Kong Government, 1959). The second university in Hong Kong, the Chinese University were formed by combining three private post-secondary colleges in 1963 (Harris, 1978). For many reasons, including the need to meet with the economic requirement of manpower and the need to satisfy the demands of the working parents, the government expanded the scale of educational services in late 1980s.

Since the rapid expansion of quantity in both the primary education, secondary school system and the higher education, there was a change that turned the profile of the social structure from a tall thin pyramid with a few privileged groups at the top to a shape that was more pear shaped with an increasing large middle. The working parents, and their children, are now more and more accessible to the tertiary educational services. In fact the education since the late 1980s, is no longer an elite system. On the other hand, with more output per year, there appears to be fewer guarantees that university graduates could easily be offered a job. In that case, the rate of return for educational investment is not as lucrative as before. There is a limitation on educational qualification in guaranteeing a lucrative return for the workers even if there is equal accessibility. However, a university degree is a degree, a recognized qualification that gives some credit to the quality standard of the holders. Many degree holders still enjoy an advantage over job competition. To many workers, a degree is still a way for better job security and upward social mobility.

According to the policy address of the Chief Executive Tung Chee-Hwa in October 2000, the government is going to create 6,000 more Secondary Four places, equivalent to 10% of all Secondary Three students (Tung, 2000). Without increasing the resources to the universities, there would be a bottleneck effect from the increase in Secondary Four places, with too many chasing the limited university places.

Under the government's projection (Report on Manpower Projection to 2005, 2000), there will be a shortage, in the order of 116,900 people, of tertiary educated workers in the next few years. It might not be impossible but difficult and costly, within a few years time frame, to upgrade all the projected number of 136,000 people from the lower secondary and below education level to cover the deficit of the 116,900 people required by helping them to achieve first degree or above educational level. It is instead easier to upgrade them to achieve postsecondary level (but lower than the first degree or above level). This would at least solve more than 50% of the problem. The immediate target is to upgrade the skills and education level of the workers (lower secondary and below) up to post-secondary level. Otherwise some of these workers may face the risk of being squeezed out of the job market if they do not improve their job skills.

Form four to form seven, the four years after compulsory education; tend to be entirely dominated by the Certificate of Education and A-Level examination systems, leaving students who do not score well at either of these levels believing themselves to be a failure in the eyes of their parents and those around them. In reality, the education system should provide them with feelings of satisfaction and empowerment in relation to the subjects they have learned effectively, even if they have not reached the standards demanded for the entry requirements of the universities. These feelings of satisfaction and empowerment cannot be fostered if what they learnt are purely theories in which they have no applications on their day-to-day activities. The present system failed for such value development and tertiary education remains the center of attraction for the students to compete. Those groups of students who failed to compete are also poorly prepared to enter the workforce immediately. It seems the possible solution, to compensate for the shortfall of the present system, is to organize training programmes lower than first-degree level and higher than secondary level with vocational-oriented approach.

On the other hand, most parents wish their children to achieve at least a university degree (Lau, Lee, Wan and Wong, 1991). It is also true that many primary and

secondary pupils would like to proceed into higher education (Wong, 1997). Students usually enter vocational training at a sub-degree level only if they cannot achieve their first choice of education. Working parents and other people from higher social class both wish to have children to earn a degree.

Unfortunately there appears a strong display of cultural capital in Hong Kong (Wong and Hui, 1992) and it is therefore argued that the education system in Hong Kong is far from an equal opportunity system. In order to strive for a more equal opportunity system, experiences from overseas might be borrowed, as least to serve as references, for Hong Kong.

The issue of equal opportunity has received considerable attention in developed countries since the publication in 1966 of a massive national study conducted by James Coleman and his colleagues in the United States. Titled *Equality of Educational Opportunity*, this federally supported study collected data on approximately 600,000 students at more than 4,000 schools. Congressional sponsors of the study expected it would show that low achievement among students with low socioeconomic status was due to low expenditures on their education, thus providing a basis for increased funding of the schools they attend.

Coleman and his colleagues reported that, as expected, achievement was highly related to students' socioeconomic background and those schools with high proportions of working-class and underclass students generally were not as well funded as middle-class schools. However, they also found that expenditures for reduced class size, laboratories, libraries, and other aspects of school operation were fundamentally unrelated to achievement after taking account of (1) a student's personal socioeconomic background and (2) the social-class status of other students in the school. Many readers incorrectly interpreted the data to mean that schools cannot be successful in improving the performance of economically disadvantaged students, but the result did support two conclusions: (1) simply spending more on education for disadvantaged students should not be expected to improve their achievement substantially, and (2) placing students who previously attended mostly working-class schools in schools with middle-class students could improve achievement (Coleman et al., 1966; 1990).

Similar conclusions were widely disseminated in the following decade after the publication of two influential books by Christopher Jencks and his colleagues. After analyzing numerous data sets collected by the U.S. Census Bureau, re-analysing data

available from *Equality of Educational Opportunity*, Project Talent, and other large studies of U.S. Schools, and examining many other relevant sources, Jencks and his colleagues conclude that (Jencks et al., 1972; 1979):

- (1) School achievement depends substantially on students' family characteristics.
- (2) The schools accomplish little in terms of reducing the achievement gap between students with higher and lower socioeconomic status.
- (3) Family background accounts for nearly half the variation in adult occupation status and between 15% and 35% of the variation in adult earnings, depending on the data set analyzed and the statistical method researchers employ. Individuals from families with high status are relatively successful economically in part because they acquire more education and skills than individuals from families with low status.

Conclusions similar to these are apparent from numerous studies in other countries. For example, scholars at the World Bank reviewed several decades of research on education internationally and reported that family background has an “early and apparently lasting influence” on achievement, particularly when alternate measures of social class are used to take account of difference between countries. Regarding relationships between social-class background, amount of schooling, and later economic success, a review of studies in Great Britain concluded that schools there have served as “mechanisms for the transmission of privileges from one generation of middle-class citizens to the next”; analyses of data collected in France, Germany, Great Britain, Hungary, Ireland, Poland, Scotland, Sweden, and other nations also support the conclusion that education importantly helps children from middle-class families attain financially rewarding employment more frequently than it helps children from working-class families (Goldthorpe, 1987; Lockheed, Fuller and Nyirongo, 1988; Marshall, 1990).

This does not mean, however, that all or even most students from low-income families will be unsuccessful as adults or that the schools should be viewed as mostly unsuccessful in helping provide worthwhile opportunities for students with diverse socioeconomic backgrounds. Overseas and local research supports the following general observations:

1. Although students with low socioeconomic status tend to perform poorly in school and subsequently have restricted employment opportunities, a substantial proportion of working-class children and some from families living in poverty do

eventually attain middle-class status (Featherman and Hauster, 1978; Hout, 1988; Krynowski, 1991).

2. The educational system has played an important part in helping many persons rise in status beyond that of their parents. Its role in promoting socioeconomic mobility has grown more central as middle- and high-status jobs have become more complex and increasingly require specialized educational skills and credentials (Goldthorpe, 1987; Hout, 1988; Kutscher, 1990; Youngblood, 1992).
3. As education increasingly determines socioeconomic status and mobility, college attendance and graduation constitute of a kind of “dividing line” differentiating persons who are likely to attain high socioeconomic status and those who are not (Levy and Michel, 1991; Peterson, 1991; Evangelauf, 1992).
4. Educational, social, and economic opportunities are not sufficiently available to overcome the disadvantages of the underclass population. Children who attend low-achieving poverty schools are disproportionately likely to remain very low in socioeconomic status (Pong and Post, 1991; Tsang, 1992, 1993).

4.5 Challenges Facing the Workers Today

In the survey data of the year 2000, Hong Kong had a workforce of about 3.3 million people, of whom about 37% have an educational attainment of lower secondary or below, whereas only 27% of the workforce had post-secondary or above education. Another 36% lied between lower secondary and matriculation level. (Government of the HKSAR: Report on Manpower Projection to 2005, 2000). In the report, out of 170,000 unemployed persons, about 50% have lower secondary and below education. Although the unemployment figures change from time to time (they increased to 259,000 in August – October, 2002), it is generally believed that education attainment levels of the workers tend to have a direct correlation to the employment rate (Peebles, 1988). In the year 2000 manpower projection report, it was also indicated that if the provision of post-secondary and above education remains at the present level, by the time of 2005, demand for manpower from post-secondary or higher education level will outstrip supply by some 116,900 people (85,000 for post-secondary but below first degree level and 31,400 of first degree and above). On the other hand, there will be a surplus of workers at the lower secondary education and below level by 136,000

people. In other words, over the next few years total manpower demand and supply will roughly balance out, but there will be mismatch of job requirements with the educational attainment of the workforce.

At present, the workers in Hong Kong are already facing enormous challenges as the unemployment rate has been increasing over the years (Census and Statistics Department, 2002). The restructuring of the economy, namely the shift of secondary to tertiary-based industries, coupled with the competition of cheaper supply of labour from Mainland China intensified the problem facing the workers. Previous vocational training produced large groups of workers, for example textile workers, in which the skills were limited to so-called sunset industries. There is little success to re-train these workers, who are mainly in their forties to fifties, to re-enter into workforce with comparable wages. The current economic transition has hit hard at the work force which comprised of around 600 to 700 thousands low education level, low skilled or higher aged people. Among these figures, there are already more than 154,000 people being unemployed. (HKFTU Monthly Digest, May 2001).

Facing the increasing challenges, notably the digital era, globalisation; uncertainty of future prediction, knowledge-based economy and China's accession to the World Trade Organisation, the government had already outlined the requirements for workers in Hong Kong. "We need workers who have a strong sense of purpose; who are knowledgeable and competent in the work they do; capable of independent and critical thinking; sensitive and responsive to change; positive and resilient in the face of temporary setback; and creative in problem-solving". (Excerpt of a speech by Chief Executive Tung Chee-Hwa to the Hong Kong Management Association, 2000). These requirements of the workers cannot be achieved by the individual efforts alone. They need to be fostered through education, training and career development.

There are many ways that workers can learn. They learn about their jobs by doing – informal, experiential learning. They learn about their social role as workers through the experience of work and through the educative role of their organizations and their communities. However if grouped into organized educational system, there would be two major types: classroom learning or work-based learning. Work-based learning has long been known to have intrinsic advantages which can confer a sense of partnership (Levy, 1986). Trainees are motivated by the real nature of the activity and learn from its direct consequences. Performance in the workplace is felt to have relevance. Trainees can learn to act systematically and efficiently, to fit naturally into the team in which they find themselves; and it may be better for them to train for working life by

means of work-based learning because they believe in it. However, people may argue that there can be and often are disadvantages. The work can be repetitive and limit the learning process and the supervisors may put production instead of teaching as their top priority.

Unfortunately, survey figures indicated only 8% of companies in Hong Kong have provided formal training for their employees (Tam, 2001). The figure compared most unfavourably with other developed economies, such as the United States (93%), the United Kingdom (83%) and Australia (68%) (Tung, 2000). The lower training rate offered from the companies is perhaps partly related to the scale of the companies in Hong Kong. Over 96% of the companies in Hong Kong are regarded as Small and Medium Enterprises (SME) (Tam, 2001) and they may not have sufficient resources to launch regular training programmes for their employees. These SMEs employ about 40% of the total workforce of 3.3 million (Law, 2000). The burden of training therefore lies largely on the shoulders of the present education system.

If there is nothing to be done in the immediate future, the problem of unemployment for people with low skill and low education will worsen, leading to a further downward wage spiral; the unsatisfied demand for knowledge workers with higher levels of education will increase, bidding up salaries and undermining Hong Kong's competitiveness. In short, there will be shortage of the higher educated workers on the one hand (116,900 post-secondary and above), and the surplus of less educated workers on the other (136,700 lower secondary and below).

4.6 Possible Role of Education in Solving the Problems of the Workers

During the past twenty years or so governments of different political persuasions in Hong Kong, the USA, the UK and elsewhere have come to the view that educational curricula have a great impact on career development. Texts such as *A Nation at Risk* (National Commission on Excellence in Education, 1985) and James Callaghan's speech at Ruskin College, Oxford (19 October 1976) encouraged the view that an education system is an important instrument for securing economic growth by preparing people for paid employment. This view is not without difficulties, some commentators have seen the view as a concealed attempt to maintain existing social inequalities and injustices and have rejected it outright (Bowles and Gintis, 1976; Giroux and Aronowitz, 1985). Radical reproduction theories in the recent past have point out that vocational education is firmly lodged within the social efficiency tradition that validates class stratification and perpetuates occupational inequality

(Bowles and Gintis, 1976). Their arguments go something like this: School-based curricular tracking acts as a social-sorting mechanism for the labour market. Schools place youths in various tracts depending upon the social class origins of their parents. Working class youths situated in lower-track curriculums are provided with vocational-technical training, and prepared for dead-end, waged-labour jobs. Thus, the next generation of working classes is readied for lifetimes of employment in blue- and pink-collar service or industrial sectors. Others have pointed out that instrumentalism is justifiable only in so far as it does encourage some vision of what actually is worthwhile but that vision has been noticeably missing from the language of vocationalism (Pring, 1995).

One might logically suspect that reproduction theories would dismiss vocational study on the grounds that it is undemocratic, dominated by business interests ready to reshape unwilling adolescent drones into productive human capital. And in its present form, perhaps, the critics are correct. Yet to suggest removal of occupational studies entirely from the schools is unwarranted. Where would the students go if they have no learnt skills to earn a living? Vocational training and public schools will not deprive working-class students self-empowerment opportunities as long as the students are encouraged to develop their learning desire and methods. The culture of Lifelong learning, once developed, can enable the students to change themselves and the world.

One general observation is obvious: no one can predict the future precisely, and therefore no one can predict exactly the nature of employment opportunities likely to be on offer at any one time. Manpower planners all over the world have great difficulty in predicting the demand for individuals with certain types and levels of education. For a society like Hong Kong, which has high levels of immigration, emigration and overseas training, it may also be difficult to predict the supply of persons with particular skills. Challenges have become greater as the border between Hong Kong and the rest of China has become more porous.

One response to the difficulties of manpower planning could be to leave everything to market forces. In many cases employers have given up trying to predict the detailed skills and abilities needed by members of their workforces. Rather, they stress the need for flexibility and the ability to learn new skills “on the job”, as it were (Confederation of British Industry, 1989). As a result it is not clear the form a vocational preparation should take. It is obviously futile preparing people for jobs that might not exist at the end of the preparation. This problem of not knowing just how to prepare people adequately for an uncertain future at work has led in Hong Kong to a

wide variety of training, all of which tend, however, to suggest that there are core skills the possession of which enables people to perform a wide variety of occupational roles.

It appears that the most important transferable skill is the ability and the desire to learn. Lifelong learning has emerged in recent years as a key issue on the policy agenda of many countries. This emphasis upon lifelong learning as a means of enabling individuals to adapt to changes in the world of work has been characteristic of debates not only in Hong Kong but in the European Union and beyond (Edwards, 1997). While there has been a predominantly focus upon Lifelong learning in relation to the goal of increasing economic competitiveness this has not been the only policy objective. As Jacques Delors, then president of the European Commission reflected, lifelong education must, in addition, “constitute a continuous process of forming whole human beings – their knowledge and aptitudes, as well as the critical faculty and ability to act. It should enable people to develop awareness of themselves and their environment and encourage them to play their social role at work and in the community (Delors, quoted in NAGCELL, 1997).

4.7 Using Resources Allocation to Control Educational Direction

The previous sections elaborated the fact that education policy is important to the management of the society, and the Hong Kong government is the biggest financial source for education in the territory. It is not surprising that the distribution of government money for various aspects of education, depending on the amount of financial support, would steer or discourage the developmental directions, depending on the amount of financial support. Therefore it is logical to study the funding behaviour of the government to learn the attitude of the government towards various aspects of education. In the context of this thesis, special attention was paid to the spending of government money on workers education.

As there is only a relatively short time after the transition in 1997 at the time of this writing, this chapter starts its investigation of the methods of control in the colonial period. Morris and Sweeting (1991) presented a very comprehensive summary of the influences and control methods of the Hong Kong government in the pre-1997 era ranging from setting up examination questions in open examination, intervening in the curriculum and syllabus, censorship of textbooks by the Education Department, direct control from the Education Department on school policy and, of course, resources allocation.

The government tactfully adopted a “loose-tight” approach for its policy decisions. Loose in a sense that the government appeared not to make up its own policy. It employed various advisory bodies and consultation processes to “reach” the ultimate decision. Decision made by the government would then be viewed as streamed from the public. Tight in the sense the government is the sole policy maker in legal terms. It could make decisions that were basically against the views of all other interested group if it felt the decision is of utmost important (Morris and Sweeting, 1991).

The present government appears to retain many features of the colonial government in the management of education including using resources allocation and the “loose-tight” strategy.

Resources allocation is especially emphasised in Morris and Sweeting’s article as other means of control could be viewed as too direct, autocratic and may therefore induce rebound from the various social groups. Direct control from the government most likely be reserved for less sensitive issues where the tolerance level of the various social groups would be higher.

Resources allocation, on other hand, has no direct restrictions of undesired activities. Funding is channeled to those desirable areas and, if the education system is financially dependent on government money, the undesirable elements would wither away. For those desirable programmes and strategies, funding is required to convert them into reality (including both “hard” resources like cash, school premises and equipment, and administrative offices, and “soft” resources such as teachers and technology).

As many primary and secondary pupils wanted to proceed into higher education (Wong, 1997), the direction of higher education had a pivotal role for other education sectors. In other words, if the government could control the tertiary education system, it could set the tune for the whole education system. It was also “efficient” to invest in higher education as the selection process already screens out “less capable” students. It was indeed indicated by one author that the government employed resources allocation to steer the direction of higher education development in Hong Kong (Cheng, 1997).

The Hong Kong government regularly spends about three per cent of Hong Kong’s gross domestic product (GDP) on education (Tung, 1997). This indicates how much of its wealth Hong Kong has identified for education. At a closer look, it is not

difficult to find that Hong Kong operated a system with a large but 'cheap' sector of general education, and an expensive but tiny sector (until the recent expansion in 1993). The unit expenditure (that is the money spent on each student) for primary and secondary students was, in 1992, US\$1,153 and US\$1,795 respectively (Cheng, 1993). These compare very unfavourably with international norms. For example, data in 1993 indicated that the unit expenditure for similar age group in Switzerland was around US\$7,000, in United States was US\$6,500, in England was US\$4,500, in Japan was US\$4,500 and in South Korea was US\$2,000 (The Economist, 1997).

Hence, although Hong Kong entertains a large student population in primary and secondary schools, the total amount spent on school education is still on the low side. Meanwhile, the unit expenditure for a university student in Hong Kong, for example, could be as high as US\$16,000 (Cheng, 1997). This is 130% of Hong Kong's per capita GDP and is above by international standards. However, for a very long time, this rather high expenditure went to only the selected few: 2% of the relevant age groups before 1989, and 15% since 1995. Hence the total amount again is comparatively low (Cheng, 1997).

All of the present eight institutions of higher education at present are financed by public money. Another institution, the Open University, was established in the view of becoming financially independent in the future. Yet, at least at the time of writing, the Open University has not gained its own independent status. All tertiary institutions are established with their own ordinance which guarantee their academic autonomy (a loose approach), yet they are all financially dependent on public money (a tight approach).

It is not surprising that the Government is very concerned about the proper spending of its investment. The University Grants Committee, which advises the Government on higher education policies, was established according to the British model of University Grants Committee, which itself was abolished in Britain in the mid-1980s and replaced by The Higher Education Funding Council for England. Instead of a government higher education department, it is a "loose-tight" device to maintain accountability for public funding on the one hand and to preserve academic autonomy on the other. It practically 'slices the cake' and allocates funds to institutions. Under the overall direction set by the Education Commission, the Committee usually allocates their sources on a unit cost basis. The overall direction from the Education Commission was to view education as an economic investment (Education Commission, 1992) and it could be argued that education in this situation followed the

line of structural functionalism. Therefore as long as the individual university department could maintain a certain number of students, and the course could produce students that were employable, they were relatively safe to have their share of funding.

4.8 Summary of the Chapter

In short, this chapter highlighted the fact that education may be useful to advance the welfare of the workers. Unfortunately the present education system is not favourable to the workers and workers education in Hong Kong is mainly organized under a functional approach context as perceived by the government. As the biggest player in the educational system in Hong Kong is the government, it is important for the workers to change the value and attitude of the government on the direction of the education system in the future. There were various attempts from the government to control or intervene education in which resources allocation appears to be the most obvious manner as a control manner. If the workers wish to improve the education opportunity for themselves or for their children, they may need to influence the funding policy of the government.

This Chapter also argued that government, apart from economic considerations, is willing to alter her funding policy to balance and compromise the demands from various stakeholders. The workers may therefore join hand together for a collective bargaining approach. In this case, the present education system that may be unfavourable to the interest of the workers can be altered by higher funding allocation to workers education through collective bargaining. The collective bargaining role of the union leaders is to be discussed in the next chapter.

The importance of Lifelong learning for the workers was highlighted in the last section of this chapter and it is natural to conclude that the trade unions should lobby the government to support Lifelong learning financially for the workers. In the next chapter therefore we shall turn to the agency role of the trade unions, the ways in which they can influence education policy and provision.

Chapter 5: The Agency Role of Trade Unions in Education

In any society, the structure of educational life chances is something built on the hopes and expectations of different constituencies of people – thus reflecting the distribution of cultural capital – and on the way in which these are articulated through different agencies in the realm of policy, politics and power.

Systems of education can therefore be seen as an outcome of the precarious and changing balance of power, resources and expectations that characterise the social structure of a society. As has been shown in the previous chapter that education may be useful to advance the welfare of the workers, and yet the present education system is not favourable to the workers. It is therefore important for the workers to lobby the various parties that are influential to the shaping of the education system in Hong Kong so that a more favourable education system that would include, in its policy agenda, the interest of the workers.

The agency that has prevailed in shaping HK's system of education is the state. Under the changed political circumstances of HK, new agents come into view. Of particular importance to this study are the new political authorities in HK and the trades unions. It is not clear yet how these 'agents' will shape the future of education. The government is clearly concerned to change education around the principles of Lifelong learning (Government Policy Address, 1998). The trades unions are trying to fashion a new role for themselves in the new HK. What is not clear is how both the state and the unions will work together and whether or not the new policies will be sufficient to challenge the prevailing framework of attitudes towards education among the ordinary working people of Hong Kong who, as parents, play such a decisive role in forming the expectations of their children.

This chapter is built on the argument that the educational system of a society is a negotiated, historical compromise between classes, the state, interest groups and employers. HK is interesting because the balance of all these forces has altered. The new order has not yet settled down and it faces challenges – globalisation, loss of jobs etc – that the former colony is not yet meeting very well. The future educational directions of Hong Kong are the aggregated forces of the expectations, objectives and activities of the various agencies, or players, in the educational field. It is important for HKFTU to identify its future direction in its role of education. To achieve its educational function, HKFTU must identify the needs and requirements of the working people, to realise its market positions among other educational players and to

capitalise its relationship with the biggest player in the field: the government.

5.1 Patterns of Expectations: Cultural Capital in Hong Kong

As described in earlier chapters, cultural attitudes to education are an important factor which shapes the choices and priorities of parents, hence affects the educational attainment of the children. Such choices may or may not fit in with the developmental needs of the society or with political ideas about social justice and fairness. Hong Kong is a divided society and many working class people have poor educational qualifications. They were given few opportunities by the colonial state and many, in any case, were migrants from China. The older generation is education poor, but the younger generation – especially those who are better off – have very high expectations of education. Whether the government can accommodate these within the resources available and in a way that they economy require, is not at all clear. It is for this reason that we have to understand the structure of cultural capital.

One of the most important factors in a child's success in school is the degree to which his or her parents are actively involved in the child's education. Not all parents have the same resources or opportunities to act on the educational expectations they have for their children. Therefore it is possible that the impact of the parents on the learning outcome of their children is influenced by the social positions of the parents and perhaps is the basis of social stratification.

Social stratification occurs when inequalities between positions and tasks become widely accepted, or institutionalized. For example, those who occupy highly rewarded positions are able to create circumstances (i.e. admission to good schools and a home environment more conducive to school-based learning) that allow their children to occupy similarly important and rewarding positions when they mature. Conversely, those in poorly rewarded positions are unable to provide their children with the opportunities that would allow them to rise in the stratification system. In a system of stratification, differences are passed on through generations.

There are signs of a high degree of inequality in Hong Kong's social stratification system. Analyses of the class structure seem to suggest that in Hong Kong society there exists a certain extent of class perpetuation (Tsang, 1992). Tsang discovers that the ideal model of perfect mobility is far from the reality of the social structure, and that there are clear indications of immobility or class inheritance within society. Moreover, most of the offspring of the upper classes are well protected from falling

too far down the social hierarchy, while most young men and women from the lower classes are constrained from far-ranging upward mobility. This leads to Tsang's radical conclusion that "Hong Kong, in an absolute sense, is not an open society. That is because within her social structure, there prevails a number of "lines of social cleavage" along which class inheritance and monopolization of social mobility are constituted and maintained." (Tsang, 1992: 65,84).

Wong and Lui's conclusion is less extreme. They can see opportunities and openness in Hong Kong society, just as there are inequalities. However, they also comment that although there are many cases of "from rags to riches", there are also many instances of "from rags to rags", and that the upper classes have shown some tendencies of rigidity (Wong and Hui, 1992: 80). Class differences seem to be associated with educational attainment. Wong and Lui's analysis revealed distinct class differences in educational attainment in which 80% of upper service class attained upper secondary or above qualifications, with half of them acquiring tertiary education. However, the working classes fared much worse: only 18% of them have achieved secondary and above qualifications; and upper-secondary education is virtually the farthest they could go (Wong and Hui, 1992:32).

"Equal access to education does not mean equal educational opportunities. It behooves us, for many reasons, not to assume that because we have the former we have the latter" (Choi, 1995). Under the argument of cultural capital (Bourdieu, 1977), even if there is an equal access to education, and even if all the parents are committed to make the best use of their resources to gain educational opportunities for their children, inequalities exist. There is a need for other stakeholders to help modify the rules and games of the present educational system. Parents in HK are not a homogenous group. Those with poor education and life chances are not well placed politically to influence the decision-making that shapes the life chances of their children. Those who are better educated are better organized to do so, exploiting social networks, political influence - through unions or the professions or their community representatives. What is interesting about HK is that those patterns of representation and agency are changing as a result of the changed character of the state.

5.2 The Major Agency: The Government

As stated in the previous chapter, the government funds almost all of the tertiary

institutions and most of the primary and secondary schools in Hong Kong, in both the colonial and post-1997 periods. In other words, they are financial dependent on the resources allocation policy of the government and they are therefore relatively shielded from the direct impact of market forces. Taking away the impact of the market forces, the government remains the major factor in formulating the educational policy.

As also stated in the previous chapter, government used to view education as a mean of social engineering, an investment in human resources and a management tool. Resources allocation is a better way to get control of the education policy in order to manage the society. Under this circumstance, as many primary and secondary pupils would like to proceed into higher education, the direction of higher education would have a pivotal role for other education sector. Therefore, as long as the government continues to control the tertiary education system, it can set the tune of the whole education system. Indeed, present tertiary education accounts for about one-third of the government's budget on education. This allocation of resources in terms of unit expenditure is highly biased towards higher education, and gives lower priority to technical education and vocational training.

However, the restructuring of the economy and the increasing unemployment rate of vocational trained workers has indicated the need for changes in the functionalism dominated education policy.

5.3 Articulation Agency: HKFTU

In 1991 the OECD published a survey of trends in union membership and union density during the 1970s and 1980s (OECD, 1991). One of the main conclusions was that in all but a few countries the postwar expansion of trade union organisation had halted in 1980s, sharply contrasting with what had in Europe been the main trend in preceding decades. The last decades of the twentieth century were unhappy ones for the trade unions. In France and the UK, the declining trend has continued for two decades. The French union density rate was halved, whereas British unions lost 40% of their strength. Italian unions fared better: in absolute numbers, the three main federations gained almost two million members since 1977 (Ebbinghaus and Visser, 1999, 2000), but more than halves of current members are pensioners and retired.

Unions in Germany, by far largest of the European economies, initially did better, but in the years following unification in 1989 they lost more than three million members.

In the smaller economies, also – with the exception of the four Nordic countries and Belgium – unions have witnessed a decline in their overall position. Union membership in Austria, France, Germany, the Netherlands, Switzerland, and the UK also experienced low numbers that probably lower than at any time since the end of the Second World War (Boeri, Brugiavini and Calmfors, 2001).

In the USA the decline began two decades earlier, in the 1950s (interrupted by the surge in public-sector unionism during the Kennedy-Johnson administration in the 1960s) and has continued since.

There were many explanatory factors suggested for the general declining trends, namely the state of the labour market, structural changes in the economy, and increased flexibility in the labour market. Recently Robert Putnam suggested that the decline in union density as a result of union problems or economic problems may be secondary, and the main reason may be a general decline in social associations with a common cause, not necessarily connected to unions themselves. Putnam referred the situation as a loss of “social capital” (Putnam, 2000). The crucial question is whether the decline of recent times forebodes continued “lean times” for the unions, or whether the unions will eventually find a way to bounce back.

The Hong Kong scenario is a bit special as compared to the other part of the world. The momentous impetus of the political transition before the 1997 “dateline”, plus the re-structuring of Hong Kong’s economy and industry because of the new “paradigm shift” created by China’s marketisation reforms, have precipitated far-reaching changes in the structure, power base, strategy and policies among Hong Kong’s labour unions and their movement. With these special factors, detailed exploration of literature from overseas would not be profitable.

Until the 1970s, two main federations dominated Hong Kong’s trade union movement: the traditionally pro-Beijing Hong Kong Federation of Trade Unions (HKFTU) and the pro-Taiwan Trade Unions Council (TUC). HKFTU membership has gained a drastic rise in recent years, up to over 300,000 by the late 1990s, due to a more proactive approach to recruitment and servicing of members, and possibly also to the HKFTU’s close association with the new administration (Snape and Chan, 1997). The TUC’s declared membership has held up surprisingly well at around 30,000 despite some loss of membership in the mid-1980s, perhaps reflecting the impact of the Joint Declaration in 1984 on this pro-Taiwan organization, and a sharp dip during 1988-9 up to 18,769 in the year 2002 due to temporary disaffiliations (Registry of

Trade Unions, 2002).

The role of HKFTU, being a pro-China political force, received a rather unfriendly treatment from the Hong Kong Government before 1997 and had to organize its own education services outside the mainstream system. Even then, HKFTU had to expand its education services enormously in the 1960s to satisfy the demands of its members. There was no stated educational ideology in that early period other than to provide basic education for those deprived children of workers. Education, especially in the time immediately after the 2nd World War, was a luxury item at that moment. Many people, working class people in particular, could not afford the expensive education system operated by the government.

The types of education provided by the HKFTU included both vocational and general education. Many critics argued that HKFTU was using education to recruit its supporters and to promote patriotic messages: The main slogans of the HKFTU were patriotism, solidarity, rights, welfare and participation. The group focused on the rights and welfare of workers, supporting the workers in their negotiation with employers and to resolve labour disputes (personal communication with the Chairman of HKFTU, Mr. Cheng Yiu-Tong). It was indeed quite true that many of the union leaders today were actually users of the education system organized by the HKFTU in the late 1960s.

The situation changed as the Government in early 1970s introduced nine-year free and compulsory education (from Primary one to Form three). The role of HKFTU in providing secondary education was then largely diminished. It is therefore a major agenda item for HKFTU to re-consider its position in education.

As was pointed out in section 4.1, there are many inequalities in HK society, such levels of inequality could, in the case of many societies, have the potential to generate class conflict. However, when industry, trade and commerce are prosperous, and the labour market is active, the wages of workers in Hong Kong are still much better than those of their counterparts on the mainland. There is less incentive for the working class to struggle for upward social mobility. Indeed, during a favourable economic condition, HKFTU have been characterized as emphasizing direct services, perhaps at the expense of workplace representation (England, 1989; Levin and Chiu, 1993).

Yet Hong Kong is now facing the worse economic downturn in the past few decades. Class conflict would soon be sharpened, as working class not only found that it is

more and more difficult to earn a living. It would probably also true that the problems would carry on in their next generations. HKFTU has a unique opportunity to assist its working members by demanding a better education system that allows higher chances of social mobility that rewards individual efforts more than inherited social classes.

After the change of sovereignty of Hong Kong to China in 1997, HKFTU enjoyed a much stronger political power and had its leaders sitting in the centre of power in the Government: the Legislative and Executive Council. The changes of political position also imposed a challenge to the operation of HKFTU. Many key players in HKFTU used to be fighters holding an antagonistic view against the policy of the Government. Suddenly these players found that they had to adopt a co-operative culture with the authority. These changes of attitudes imposed a challenge on many members of HKFTU. It is the first time in the history of HKFTU that the Government could be persuaded, not forced, to listen to the demands of HKFTU. It is also the first time that HKFTU has to design a better education to their workers without the excuses of lack of support from the Government.

A central question facing HKFTU concerns the role of the education system in producing the kind of union leaders that will bolster the confidence of the local population enough to guide the interest of the working class through the transitional period and into the twenty-first century. Unfortunately, the past and the recent education policy continue to focus on economic aspects. The structural functionalism presently adopted tends to repeat social structure to foster capitalism as before. The leaders of the HKFTU may need to develop their political vision through education outside the present functionalism mentality: The present system is dominated by the thinking of the Education Commission as stated in Chapter 4. The Government appoints all the Commission members. It was also mentioned earlier that the Commission viewed education as investment of manpower for the economic return of Hong Kong but there is little reference on providing social opportunity for the working class people.

5.4 Summary of the Chapter

As the workers regard education as an important element, HKFTU has the duty to meet the educational demand for the workers. The present education system has many shortfalls, including its present tendency of social inequality and social stratification,

and its lack of attention towards vocation and career training. HKFTU has to bring improvements to overcome these shortfalls. For trade unions, it is a matter of calling on traditional loyalties in order to best represent their members' interests in a rapidly changing market. Those interests are now being taken forward, as the agency role of the trade unions, in a number of ways. At the political level, the HKFTU is growing in its influences through its long-term association with the pro-china activities. After the handover in 1997, the government invited a number of the HKFTU's leaders to serve in both the Executive and legislative Councils. They have direct access to the center of political power in Hong Kong. At the bargaining level, the number of members of the HKFTU increased to its record high. The influential position of HKFTU however cannot be sustained if HKFTU failed to satisfy the needs of its members.

This Chapter also outlined the policy characteristics and the most important player: the government. It is indicated that the government views education as a management tool for the society. Chapter 4 also argued that the government employed resources allocation, rather than autocratic directives to control the education direction. With the collective power of HKFTU at both workers and political levels, it is now an ideal moment for the HKFTU to exercise its influence to shape an education system that is suitable for the workers. The final outcome of the political bargaining and therefore the future shape of the education system of course are dependent on the vision of the trade union leaders. This area will be dealt with in Chapter 7. Before we deal with this, however, it is important to gain an understanding of the demands workers have of education, of the opportunities they feel they have and the difficulties or deterrent factors that impair their learning activities. In this way the argument about the role of the HKFTU presented so far from a historical and policy perspective will be complemented by more precise information about the 'consumers' of education.

Chapter 6 Profile of People Engaged in Continuing Education

The title of this thesis is the Educational Duties of HKFTU in the past, present and in the future. Previous Chapters described the role of HKFTU in the past, especially during the post-world War II period up to the changeover of 1997. One of the major factors that affected the educational duties of HKFTU during that period was the policy of nine-year compulsory education from the Government effective as from 1978. A child in Hong Kong, following the policy, receives compulsory education funded by the government from primary one up to secondary three. There is therefore no longer necessary for HKFTU to provide primary or secondary education to the workers' children. Educational activities organized by HKFTU therefore shifted largely to part-time or continuing education.

Unlike compulsory education, continuing education relies on the motivation and self-initiation of the participants themselves. It is therefore important for HKFTU to understand the needs and requirements of those people engaged in continuing education before HKFTU can fulfill their educational duties in the present demand of continuing education. This Chapter is to investigate the general profile of the people engaged in continuing education. The data is then compared to the data from the interviews with the HKFTU leaders in the next chapter. The idea for such comparison is to investigate whether the HKFTU leaders understand the general requirements of the learners. The views of the participating learners can also produce an analysis of what the HKFTU should do in the future.

The rapid development of technology and the restructuring of economies all over the world, on one hand, have facilitated the growth of information circulation, indicating the insufficiency of traditional skills in a knowledge-based society. On the other hand, it has also facilitated the process of job globalization, creating an increased level of competition among employees. Active participation in the pursuit of knowledge is, therefore, important for people to keep up with the ever-changing world, as knowledge has become a crucial element for a prosperous society. If we extend the argument to the workers, it is also logical to deduce that the workers engaged in continuing education in order to update their competitive abilities.

It is therefore important to investigate the profile of the learners engaged in continuing education with a special interest in learning whether the workers,

especially the blue-collar workers (which mainly consists of the working class people as defined in an earlier chapter) are already engaged in the learning activities. If the answer is yes, then the HKFTU should consider how to facilitate and maintain the learning momentum of the workers. If the answer is no, then HKFTU would also need to consider how to instill the concept of continuing education, or in the same line of argument, how to foster the concept of Lifelong Learning to their worker members.

As pointed out in earlier chapters, the Hong Kong Government provides nine-year free and universal basic education (Primary One to Secondary Three), beginning at the age of six and up to 15. Beyond that, about 90% of Secondary Three leavers receive highly subsidized senior secondary education or equivalent technical education. The rest go into other educational openings or employment. Highly subsidized university education is available to 18% of the senior school leavers. In addition, another 20% of the relevant age group has access to higher education in other forms. In other words, a large part of continuing education would be regarded as adult education in the local context. In this Chapter, the term “Continuing Education” is therefore regarded roughly the same as “Adult Education”.

In a way, active participation in continuing education is more a “self-initiated” exercise, as least in terms of financial commitment, as compared to the main stream of education and the level of government subsidy is relatively low. Under the influence of user-pay mentality, participants would, in theory, need a stronger motivation to be involved. In Europe, and still more in North America, there has been a strong tradition of research into the reasons why adults participate (or do not participate) in formal learning activities (Houle, 1961; Johnstone and Rivera, 1965; Boshier 1971; Darkenwald and Valentine 1985; Courtney in 1981 and 1992; McGivney, 1993). These studies, in summary, indicated that those people participated in continuing education tended to have clearer objectives such as status or job requirements. These objectives gave them stronger motivation to learn whereas they may be less motivated in compulsory education because in the case of compulsory education, the learning participation is required by the education policy rather than their own choice.

In the Hong Kong context, Chan and Holford conducted research on the profile of the adult learners in continuing education in 1991 through a telephone survey. Their research has three main aspects. First, there are socioeconomic descriptions of participants and non-participants. Second, there are studies of motivation. Third, there

are studies of the deterrents to learning. Their research indicated that blue-collar workers had a low participation rate in continuing education as compared to white collar workers.

As time changes the social characteristics also change accordingly. In this chapter, the study of the learners who participated in continuing education by Chan and Holford in 1991 was repeated in October 2001. The objective was to investigate whether the low participation rate of blue-collar workers remains a general characteristic over this 10 years time. As the idea was to compare the data and features with Chan and Holford's study in 1991 with the present investigation, the approach in terms of methodology and presentation of results was largely similarly to the 1991 study.

6.1 Survey of people engaged in Continuing Education

A survey of 432 adult learners was conducted in October 2001 in order to investigate the profile of the participants of continuing education. Adopting the approach of the 1991 study, continuing education was similarly defined as part-time and post-initial education and training. It included, among other forms of provision, in-house training and extra-mural courses.

A pilot study of 50 cases has been conducted to examine the appropriateness of the questionnaire and the practicality of using telephone interviews before the actual survey. The actual survey was then carried out on three evenings within a week, two on weekdays and one on Sunday. The identification of possible respondents on a random basis was explained in Chapter 3.

Of the 800 phone calls attempted, 579 calls were answered. The nature of the survey was explained to the recipients of the phone calls. The recipients were then asked to nominate an adult to answer the questionnaire if the voice of the recipients were obviously that of a child. For 432 calls (74.6%), qualified respondents completed the questionnaire while 80 respondents (13.8%) declined to participate. The others were rejected for various reasons (Figure 6.1).

In order to facilitate the comparison with the 1991 study, each table will present

comparable data from the two studies.

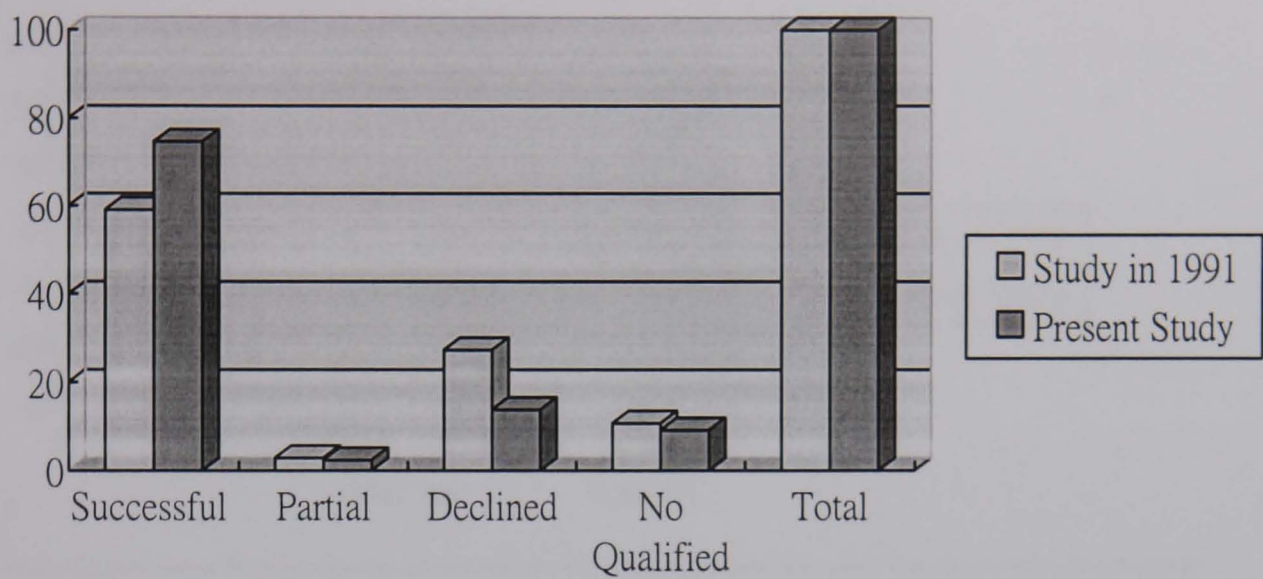


Figure 6.1: The comparison of the Percentage Response Rate for respondents successfully completed the telephone survey (Successful), partially completed the survey (Partial), declined to answer the questionnaire of the survey (Declined) and no qualified respondents at home to answer the questionnaire (No Qualified) in 1991 (Chan and Holford, 1991; n=550) and the present study conducted in 2001; n=579.

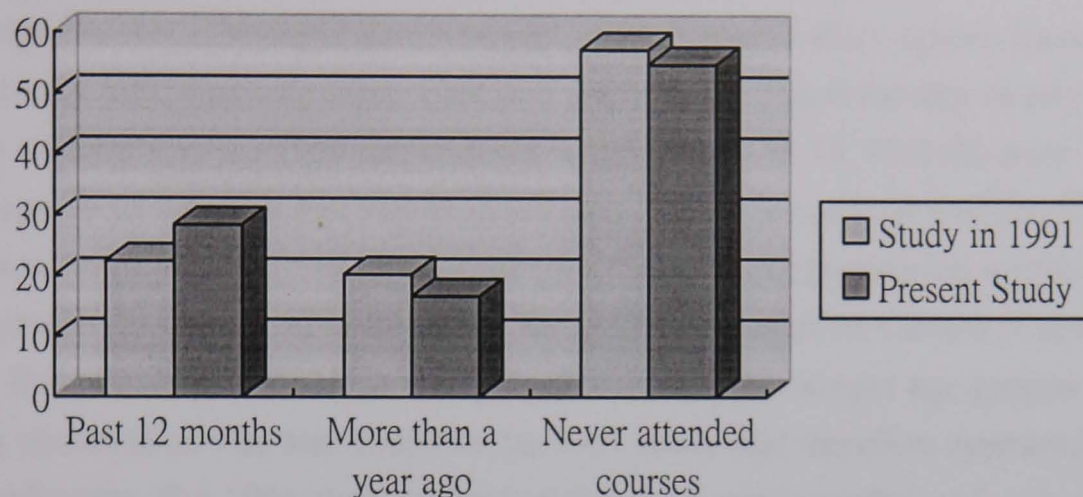


Figure 6.2: The comparison of the Percentage Response Rate for respondents who attended courses within the past 12 months (Past 12 months); attended courses more than a year ago (More than a year ago) and never attended courses before (Never attended courses) in 1991 (Chan and Holford, 1991; n=325) and the present study conducted in 2001; n=432.

In the present study, the 432 respondents were asked many questions. Similar to the approach of Chan and Holford in 1991, if they were found to have participated in continuing education courses in the past year or before the past year, they were asked further questions. Altogether, 123 (28.47%) attended courses last year and another 72 (16.67%) did so before last year. 237 respondents (54.86%) had never attended courses in continuing education.

In the results presented here, therefore, some conclusions were based on the responses of all 432 respondents, some on the answers of the 123 that attended courses during the past year and others on the replies of the 195 respondents (123 plus 72) that attended courses ever. As compared to the 1991 survey, there was, in general, a higher participation in terms of continuing education (28.47% in this survey as compared to 22.46% in the 1991 survey).

6.2 Demographic Characteristics of the Subjects

Most of the 432 respondents (76.62%) were between 20 and 34 years old with a mode at 20-24 age bracket. This age bracket covers those postsecondary school leavers who have relatively little working experience and yet have sufficient income to pay for their own studies. 4.17% of the respondents were aged 15 to 19, 19.21% were between age 34 to 59 and none was 60 or 60 plus. When the general profile of the respondents was compared with that of the total Hong Kong population within the selected groups, as published in the Hong Kong 2001 Population Census (Census and Statistics Board 2001), the sample was biased towards the younger age groups (Figure 6.3). This observation was also found in the 1991 study and therefore appeared to be a consistent feature. The 1991 study suggested that there was a tendency for younger members of a household to answer phone calls or to volunteer to be respondents. The other possible explanation is that this is a “targeted” study in a sense that only adults were encouraged to answer the questionnaire (which eliminated children from the survey) and the survey was conducted mainly on weekday evenings in which a larger proportion of working people, whom in the 1991 survey suggested to have higher engagement rate in continuing education, were accessible to phone calls at home; the distribution of respondents would skew significantly towards those who were involved in continuing education and was therefore more likely to complete the interview. In a different perspective, the 20-29 age group tended to take up courses that constituted up to 60% of all respondents, and the participation rate of continuing education declined linearly with age.

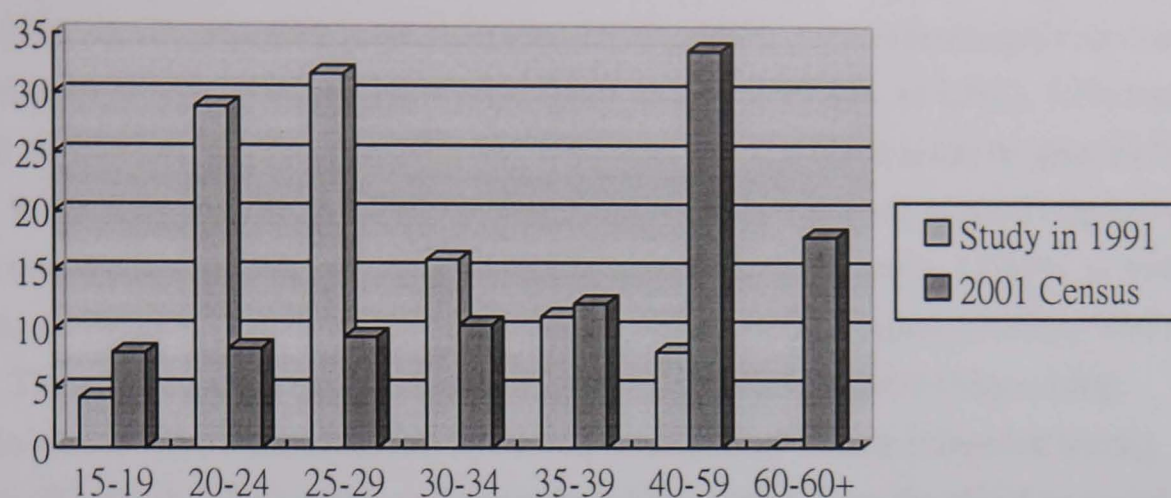


Figure 6.3: Comparison of Age Distribution between respondents and corresponding Hong Kong 2001 population census. X-axis is the age group or age bracket used in the 2001 census while Y-axis is the percentage of subjects.

From a purely speculative perspective, the higher participation rate in the post-secondary school leavers might signify the lack of vocational training in the mainstream education. Companies or the leavers themselves may recognise a knowledge gap between standard curriculum and work requirements. The company may need to provide on the job training to the new workers, or, the workers themselves need to search for additional training programmes to bridge the knowledge gap from school to work.

It was generally thought that family and other social commitments may impede older people's ambition in the pursuit of continuing education. Yet in the 1991 survey, it was not evidenced that family commitment would be a major deterrent factor for continuing education; nor was that the case in this survey either. In this survey, it was further indicated that slightly more respondents were female (55%) than male. Sixty percent of those who participated in continuing education were married, of whom 87% had children. Assuming child caring at home, though this may be a bit stereotypic, falls largely on females, the above data indicated that child caring as a form of family commitment does not have a significant effects on the participation rate in the surveyed subjects. Or, those who are currently involved in continuing education have social resources, such as hiring a domestic helper, asking other family relatives in babysitting, to handle the family tasks.

As for the educational attainment, the profile for the present survey was again similar to the 1991 survey: roughly three-quarters, 76.2%, of the respondents had received only secondary education or below (also three-quarters, 75.8%, in 1991), 17% had studied at post-secondary (also 17% in 1991), and 9% at degree level or above (7% in 1991). More than one-third, 34.68%, of the respondents were not in paid employment (about one-third, 33.13%, in 1991) including housewives (18.06%; 17.65% in 1991), students (5.79%; 5.57% in 1991), unemployed and retired persons (10.88%; 9.91% in 1991). The employed group consisted of 21.53% (21.98% in 1991) blue-collar workers (those who were involved in skilled or unskilled labour-intensive work), 21.99% (22.6% in 1991) white-collar workers (those who were involved in mainly clerical work), 21.76% (22.29% in 1991) professionals and executives. The distribution of monthly income and areas of living and working are shown below in Figures 6.4 to 6.6.

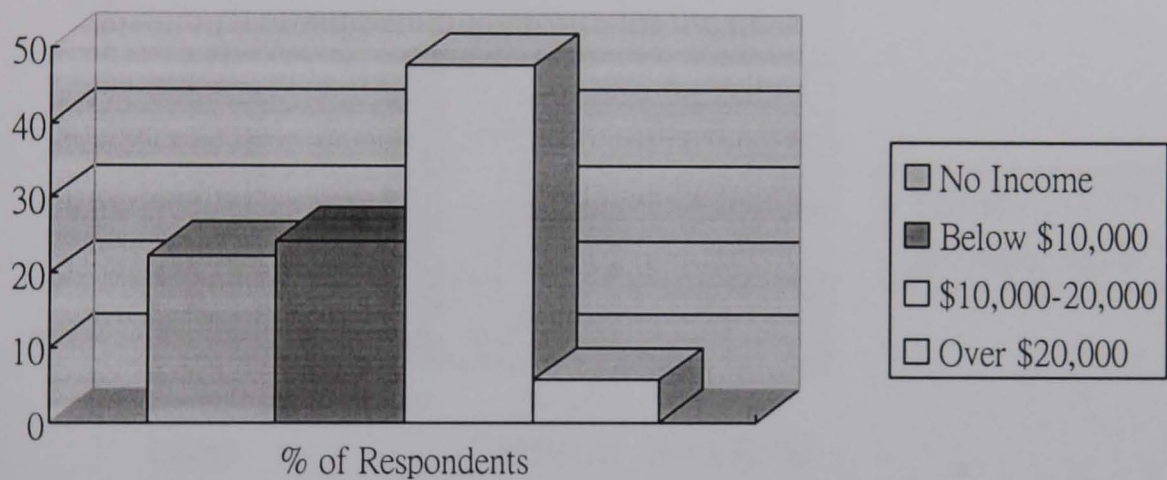


Figure 6.4: Personal Monthly Income (\$) of Respondents in the present study.

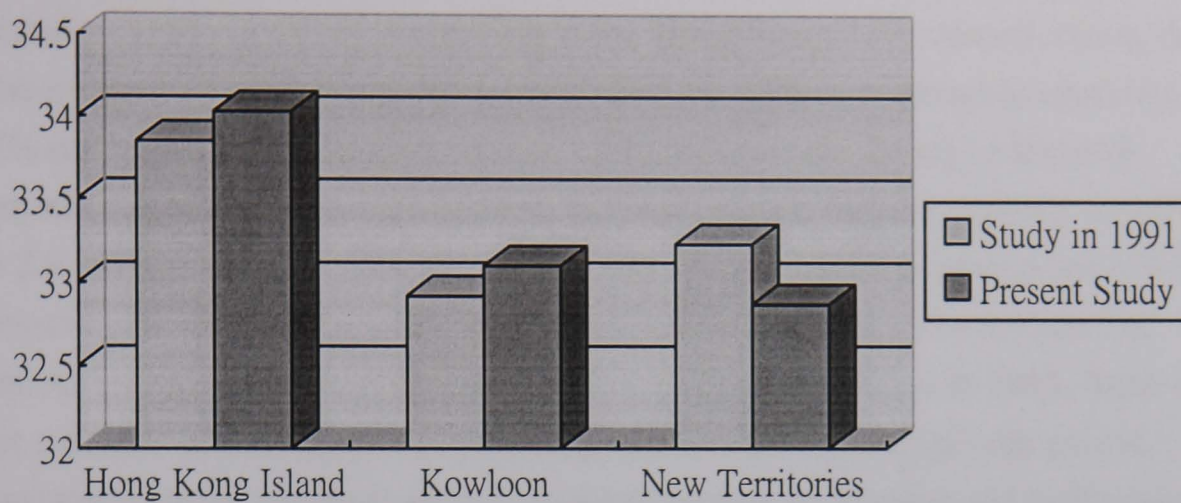


Figure 6.5: Living Areas of Respondents (%)

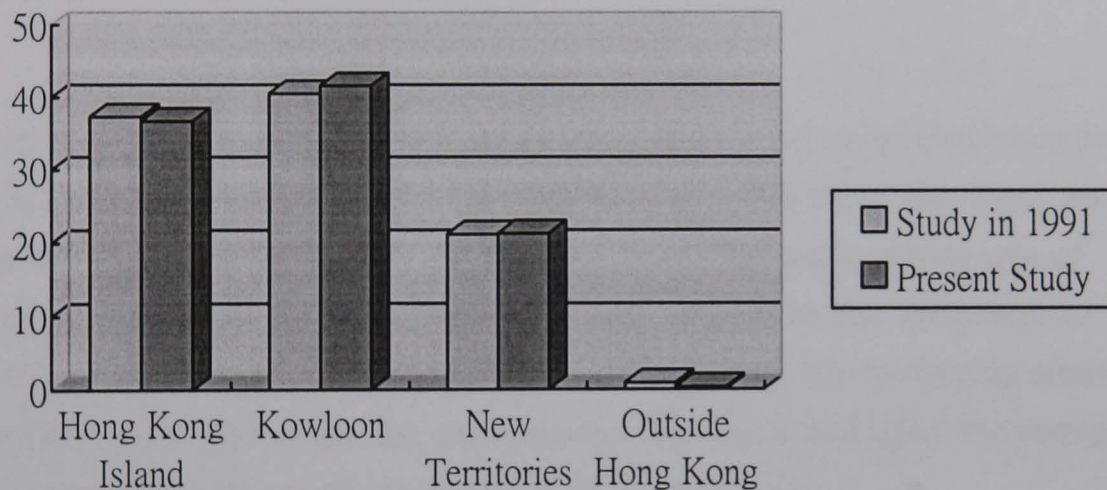


Figure 6.6: Working area of Respondents (%)

In Figures 6.5 and 6.6, the initial idea was to search whether there was a gap between living areas and working areas. The findings indicated that some people lived quite near to their working places but there were also some who lived far away from their work. The overall picture was a complete mixture.

6.3 Rates of Participation in Continuing Education

The overall percentage of respondents who had attended at least one course in the past 12 months was consistently higher than ten years previously (28.47% in this survey as compared to 22.53% in 1991). The average number of courses attended by this group

was 1.84 (as compared to 1.76 in 1991). The average course fee was \$1,798 (as compared to \$1600 in 1991). According to the Hong Kong 2001 census report, the population aged 15 or above is estimated to be 5.59 million. Roughly speaking, a 28.47% participation rate implies around 1,594,000 persons taking continuing education courses each year; the number of course places offered annually would be about 2.9 million (that is 1,594,000 times 1.84). With an average course fee of \$1,798, the volume of trade in continuing education is of the order of 5,214 million HK dollars. As compared to the estimated 2,6000 million HK dollars in 1991, there was almost a double of the market of continuing education over the ten-year period. The two surveys over the ten years period exhibited similar constraints and limitations, for example recipients of the phone calls was not randomised and the data therefore could not represent the full picture of the population. Yet the two surveys over the ten years period adopted the same methodology and the estimation above derived from the two surveys do indicate that there was a big market demand for continuing education and the trend was increasing over the last decade.

The present survey, similar to the 1991 study, consistently indicated that more females (26.42%, in this study and 25.71% in 1991) than males (18.93% in this study and 19.58% in 1991) participated in continuing education. The participation rate of housewives was however considerably lower (only 13.58% in this study and 12.28% in 1991), which suggests that employment is a driving force for continuing education. Again, similar to the 1991 study, the participation rate was also higher for younger age groups, especially for people aged below 35 (Figure 6.7).

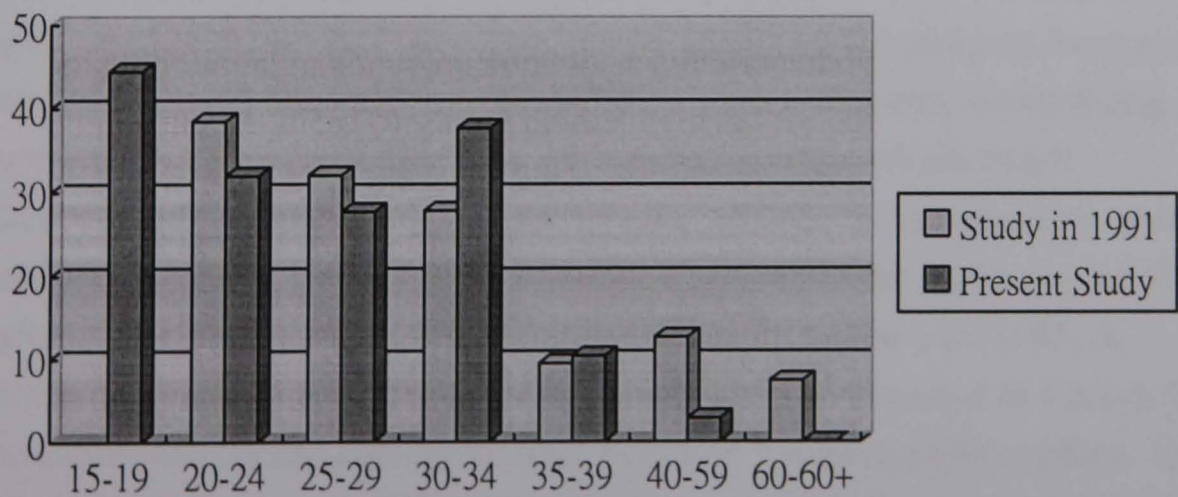


Figure 6.7: Course Attendance by Age Group; X-axis: the corresponding age bracket and Y-axis: the % attendance rate of the corresponding age group. Since the age bracket in 1991 for lower age bracket

used was 18-19 (22.22% participation rate in that bracket), and the age bracket used in the present study was 15-19. The 1991 data for the 18-19 age bracket was not shown in the figure for direct comparison.

In the present study, the participation rate of married respondents was 18.21% (17.10% in 1991), while the rate for single respondents was 33.12% (31.75% in 1991). The participation rates differed as between different income groups (Figure 6.8). As seen in Figure 6.8, the relationship between income group and participation rate was not linear.

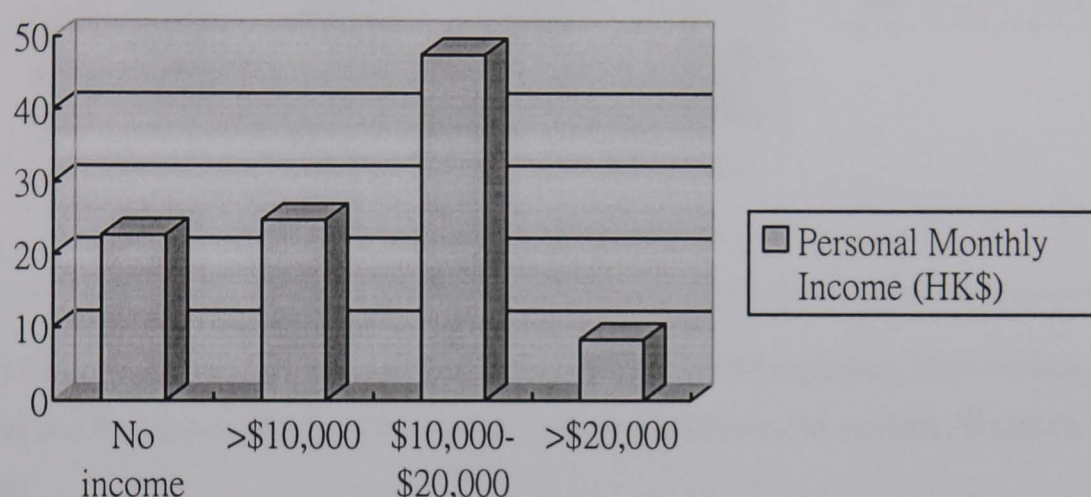


Figure 6.8: Course attendance by income group. There was no direct comparison with the 1991 data as it was difficult to comparison with no concrete matching scale of purchasing power across the ten year gap.

As indicated in the beginning of this chapter, the key objective of this chapter is to investigate whether the present education system is sufficiently engaging the workers. The participation rate of the respondents, and their various features, in continuing education was therefore investigated via the telephone survey. As the major parameters of the respondents such as age, income, occupation and education were obtained from the survey, people were then allocated to different social classes. This thesis adopts the classifications of working class from Wong and Lui (1992) as explained in Chapter 1.2 in which non-manual workers from classes 6 to 7 are defined as white-collar workers and manual workers from 6 to 7 as blue-collar workers. Their involvement in continuing education was therefore noted and then compared with the data ten years ago obtained from the Chan and Holford study in 1991.

One important observation which was consistent over the ten years was that in both the present and the 1991 study, the participation rates for white-collar workers and professionals and executives were much higher than that for blue-collar workers (Figure 6.9).

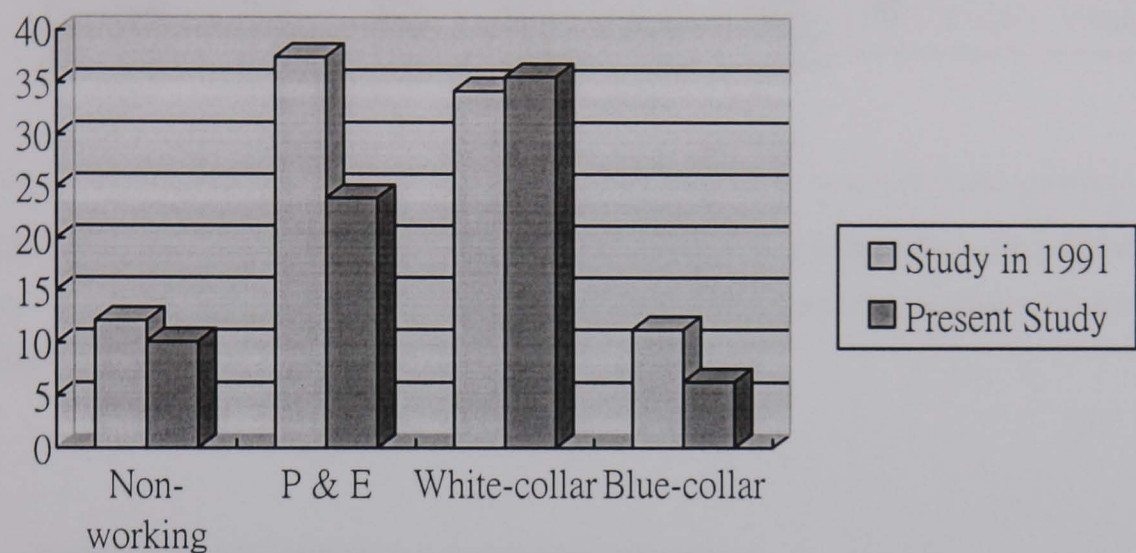


Figure 6.9: Percentage Course Attendance by Occupation. X-axis (Occupation): Non-working; Professional and Executives (P&E); White-collar workers and Blue-collar workers; Y-axis (% Course Attendance)

It appears those post-secondary graduates that do not have a degree qualification have the highest demand on further education (Figure 6.10). Although blue-collar workers were mainly from the less educated groups (93.4% received only secondary education or below), most white-collar workers were also from the less educated groups (70.9% received only secondary education or below) but had a much higher participation rate (Figure 6.11). Chan and Holford also noted this observation in 1991.

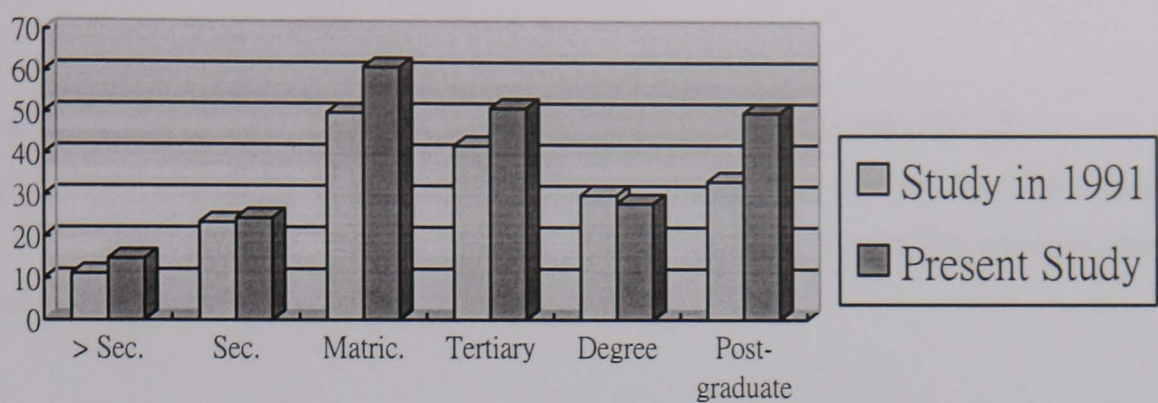


Figure 6.10: Percentage Course Attendance by Education Level. X-axis (Education Level): Below Secondary (> Sec.); Secondary (Sec.); Matriculation (Matric.); Degree and Post-graduate. Y-axis: Course Attendance Rate (%)

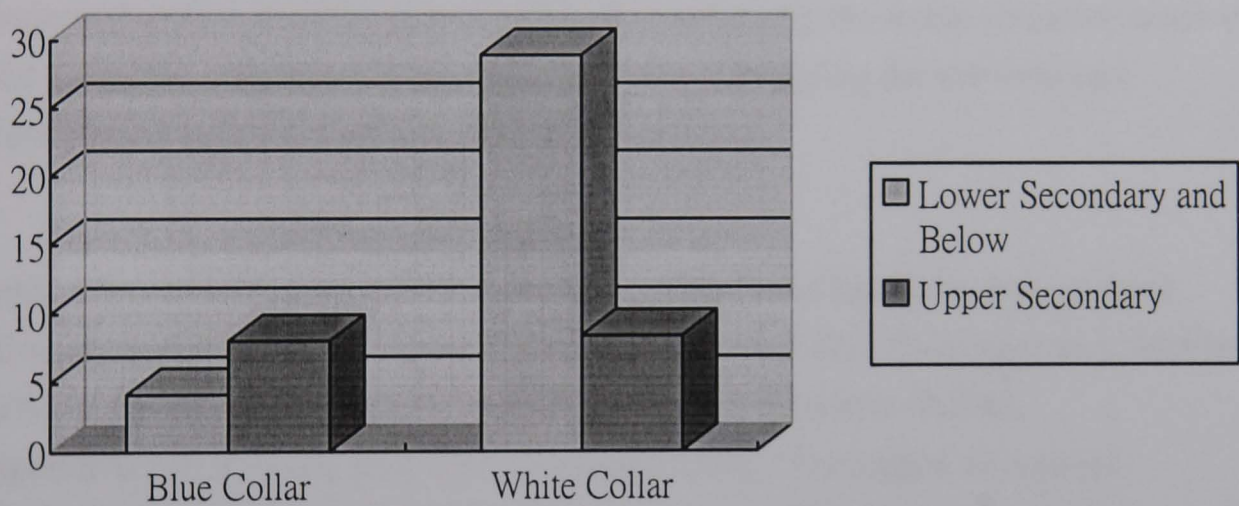


Figure 6.11: Comparison of Participation Rates between Blue-Collar and White Collar Workers. X-axis: Blue-collar workers and White-Collar at different education level. Y-axis: Participation Rate (%) in Continuing Education.

It is more obvious that the non-degree post-secondary white-collar workers have a higher participation rate for further education. It is possible that these people belong to the groups where an additional effort of education would provide them with a qualification (e.g. a degree), as compared to the white-collar workers with a secondary or below educational level in which a lot more effort is required to gain a degree. It is therefore very important for the policy maker to intervene and energize these people to get to the threshold for continuing education at an early stage.

6.4 Nature of courses attended

Regarding the courses most recently attended in the past 12 months by 123 respondents, most (42.27%, as compared to over 60% in 1991 survey by Chan and Holford) were short courses, lasting not more than three months. In the present study, the bulk of these courses were with fees below \$500.

On the other hand, 17.89% took courses that lasted more than 400 hours. Such a long duration of study may lead to a recognizable qualification, and is usually more expensive. Some 11% of course participants received sponsorships from their employers, mostly in the form of refunds for their course fees, as compared to the 26% of similar group that received sponsorship from their employers in 1991. It therefore appeared the employers were less supportive towards sponsorship of continuing education in 2001. It is possible that following the Asian financial crisis in the year 1998, the employers were might still busy struggling for survival and therefore placed staff training into their lower priority.

The most popular subjects were IT (computer studies) and business management. Teaching methods employed in courses included lectures (85.9% of courses), tutorials (3.8%%), computer assisted learning (0.2%), outdoor activities (0.3%), correspondence (6.9%) and practice/placement (2.4%). The nature of courses therefore skewed towards white-collar type of training. This observation was consistent as compared to the 1991 survey and may, as discussed earlier, play a part of encouraging more white-collar workers to participate into continuing education. With less offering of useful courses for blue-collar workers, there would be less available course information for the blue-collars. Lack of course information was found to be one of the major deterrents as reported in a later part of this chapter.

6.5 Motivation of course participants

For those respondents who attended courses last year and those who did so before last year (195 in total), questions were asked about the reasons why they took part in those courses. Similar to the 1991 survey, these respondents were first asked to state their objectives of taking the courses they last attended. The results show that Hong Kong

adults in general express a general desire to improve their personal abilities (Figure 6.12).

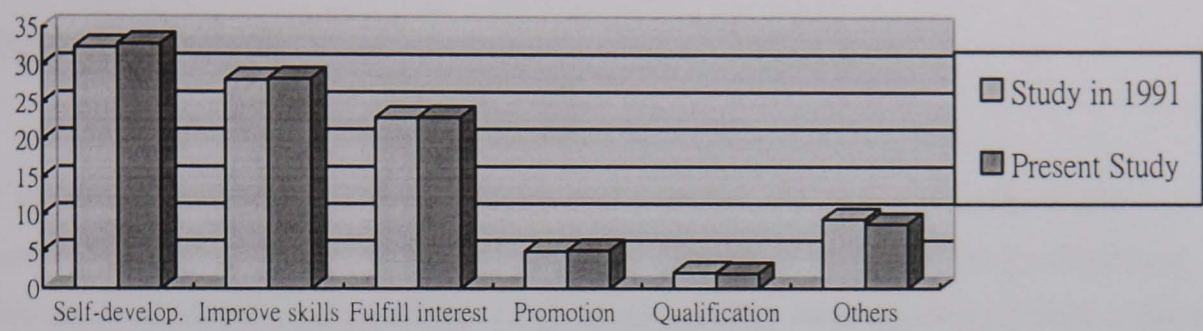


Figure 6.12: Motivational Analysis. X-axis: Motivation Factors: Self-Development (Self-develop.); To Improve Skills (Improve Skills); To Fulfill Interest (Fulfill interest); Promotion Prospects (Promotion); To obtain qualification (Qualification) and Others. Y-axis: % of respondents

The respondents were then prompted with a list of factors and asked whether each factor was one of the major reasons for them to take the courses. The results are listed in Figure 6.13.

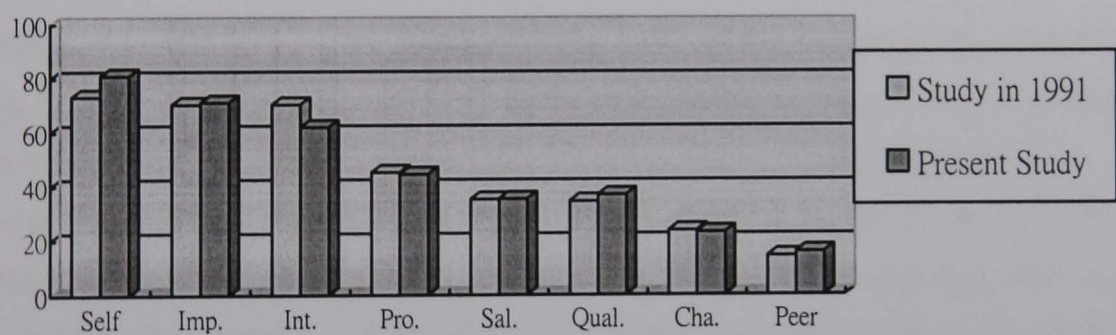


Figure 6.13: Motivational analysis (prompted responses). X-axis are the various Motivational Reasons: Self-development (Self.); To Improve Job Skills (Imp.); To fulfill Interest (Int.); Promotion Prospects (Prom.); Salary Increase (Sal.); To Obtain Qualification (Qual.); To Change Jobs (Cha.); Peer Group Encouragement (Peer). Y-axis: % of Respondents Selecting the Corresponding Motivational Reasons.

Similar to the result in Figure 6.12, Figure 6.13 named the three factors ‘self-development’, ‘to improve job skills’, and ‘to fulfill interest’ as the major motivational reasons. The same pattern was also observed in the 1991 study. As these three motivational reasons were largely intangible and not easily quantitatively measurable, it was possible that the respondents themselves had an urge to be involved in continuing education but could not explained it in a clear manner. Another possible reason was that the methods employed by Chan and Holford in 1991, and

therefore this study, were not sensitive enough to measure subtle differences of various motivational needs of the respondents.

6.6 Deterrents (general)

Similar to the investigation of the motivational reasons, the opposite side of the spectrum, that is the deterrent factors that hinder people from continuing education, were also studied. All the respondents (432 in this study) were prompted with a list of possible deterrents provided in the 1991 study and asked to select those applicable to them. Major deterrents were expressed in Figure 6.14.

Similar to the 1991 study, “Time” was perceived as the most critical deterrent: 68.29% of the respondents in this study (71.69% in 1991 study) stated that they did not have time to attend any, or any more, courses. In a way “No Time” may be convenient excuse, putting the blame of not being actively involved in learning to “No Time” might sound better than being lazy, or lack of energy.

The other deterrents were quite similar to the 1991 study, naming “Inconvenient meeting time”, “Need to take care of family members”, “Lack of course information”, and “Inconvenient meeting place” as the key deterrents. It was possible that self-discipline and willingness to learn are two important elements to maintain one’s momentum in continuing education, yet the lack of these two qualities was not investigated in this survey. Although there might be some elements of truth in the responses given by the respondents, the present study method might not be adequate to differentiate reasons from excuses.

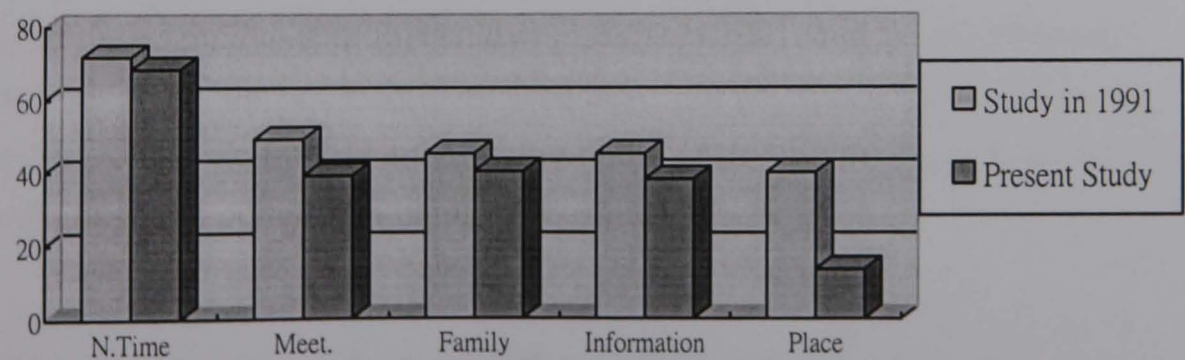


Figure 6.14: Major Deterrents. X-axis are the major deterrent factors: No Time (N.Time); Inconvenient Meeting Time (Meet.); Need to Take Care of the Family (Family); Lack of Course Information

(Information); Inconvenient Meeting Place (Place). Y-axis are the % respondents that selecting the corresponding deterrent factors.

Other than the major deterrents, some other deterrents (selected by less than one-third of the respondents) were presented in Figure 6.15. These deterrents might also needed to be addressed if more people are to be encouraged to participate in continuing education.

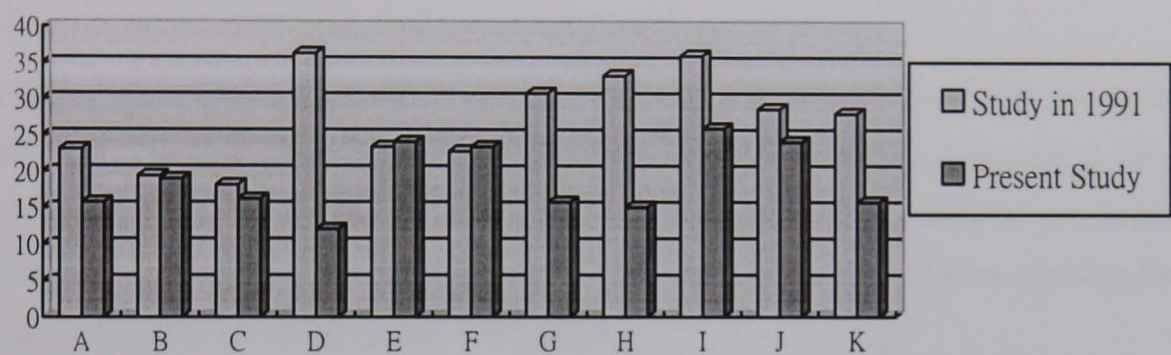


Figure 6.15: Other Deterrents. X-axis other deterrent factors: No Money (A); Course Fee too High (B); Course not Useful (C); No Suitable Course (D); Not Confident in Studying (E); No Encouragement from Other (F); Too Old to Study (G); Education Background Inadequate (H); Not Interested (I); Prefer Other Activities (J); Prefer Self-Learning (K). Y-axis are the % respondents that selecting the corresponding deterrent factors.

When those respondents (237 in the present study) who had no continuing education experience were examined, factors relating to time and lack of course information' continued to be most frequently selected. Again these were external factors and there might be internal factors that might be more intrinsic and hidden in individual psychology. External factors might be easier for the policy makers to handle, for example to consider financial assistance or tax exemption for those who need financial resources, yet psychological deterrents would need to be handle in the learners' early life while their attitude to wards Lifelong Learning (expressed in terms of Continuing Education or Adult Education) was developing.

6.7 Deterrents (for respondents of different background)

There were three groups that were highlighted in this study that tended to have a

lower participation rate: The housewives, the older age group (age older than 40: Not exactly the elderly) and the blue-collar workers. The three groups were also identified in the 1991 study and it therefore appeared that there was certain consistency in terms of low participation rate.

In the cases of the housewives, the time problem appeared to be the major deterrent factor: 83.33% (82.46% in the 1991 study) cited this factor as a deterrent. Lack of time was further confirmed in this group as the fact that many of them (95.83%) needed to take care of family members (87.72% in the 1991 study).

For the older age group (aged 40 or above), a higher percentage (74.29% or 69.39% in the 1991 study) thought that they were 'too old to study'. Generally speaking, they were less confident about their ability to learn with less interest to attend continuing education courses (54.28% or 50% in the 1991 study) and claimed they did not have the money (42.86% or 40.82 in the 1991 study).

The key concern, because more relevant to the educational duties of the trade unions, was the lower participation rate of the blue-collar workers. It was consistent over the ten years that blue-collar workers had a lower continuing education participation rate (6.32% or 11.27% in the 1991 study). The apparent lower participation rate in the current survey was not explained but in the next Chapter, it was suggested by the Union leaders that poorer economic conditions might discourage participation rate in continuing education. The present economic condition, after the Asian financial crisis, is indeed poorer as compared to ten years ago.

The low participation rate could be related to time: 82.1% (or 80.28% in the 1991 study) named "No time" and 57.89% (or 57.75% in the 1991 study) named "Inconvenient Meeting Time" as major deterrent factors in this group. They might have longer working hours, or irregular hours (therefore "Inconvenient Meeting Time" and many of them (65.26% or 64.79% in the 1991 study) needed to take care of the family. The family commitment factors might also be related to resources other than time, for example hiring a domestic helper or relying on friends or relatives to take care of children. Unfortunately the questionnaire was not designed to investigate these elements further and the deterrent data, for the first three most factors, was not statistically different between the blue-collar and the white-collar workers (Table 6.7.1). Again, as explained in the Methodology Chapter, the survey method may not

be sensitive enough to detect the real reasons why blue-collar workers exhibit a lower participation rate in continuing education.

Detergent Factors	White-Collar Workers	Blue-Collar Workers	Total
No. Time	76	65	141
Inconvenient Meeting Places	54	37	91
Need to Take Care of Family	61	38	99
Total	191	140	331

Table 6.7.1: Chi-Square Table for the first three deterrent factors (degrees of freedom =2; Chi-square = 1.556; $p < 1$)

It was interesting to note that in general, the percentage of blue-collar workers who indicated that they were not interested in attending continuing education courses was rather high (51.57% or 53.52% in the 1991 study), with consequently, as mentioned earlier, a low participation rate. It might be related to technical issues, for example 'lack of course information' (49.47% or 53.52% in the 1991 study) and 'inconvenient meeting place' (48.42% or 50.70% in the 1991 study); or might be related to the culture of that part of social group in which continuing education is not in their social agenda.

6.8 Summary of the Chapter

As compared to the 1991 study by Chan and Holford, the present survey indicated a higher participation rate in continuing education (28.47% in this survey as compared to 22.46% in the 1991 survey). Considering the intrinsic errors and uncertainties involved in the telephone survey such as no control of the person who answered the phone, not sure whether the person was telling the truth, no other input of information such as body languages to rectify the data), the differences might be regarded as insignificant. The same observations and arguments also applied to other indicators and measurements in the two surveys. Taking all these into considerations, the two surveys, though ten years apart, provided remarkably similar profiles in the learners

involved in continuing education.

In a way the similarity of the two surveys indicates that there were no significant improvements in terms of participation in continuing education. If continuing education, as a component of Lifelong Learning, is regarded as an important element in a learning society, the stagnant profile over the ten years suggests that there were no improvements among the government and the education providers in promoting Lifelong Learning. Those respondents who did not participate in continuing education named “No Time”, “Inconvenient Meeting Time and Place”, “Need to take care of family”, “Lack of Course Information” as the major deterrent factors; they did not in a sense dislike or disapprove continuing education. Unfortunately the questionnaire did not include a direct question “Whether they think continuing education is useful.” Yet as judged from the present data, people in general agreed that continuing education is meaningful except that they did not participate mainly because of deterrent factors that hinder them from participating.

The most disadvantaged groups in participating in Lifelong Learning, over the ten years, continue to be the housewives, the older age group and the blue-collar workers. The findings of the blue-collar workers, in particular, were relevant to the topic of this thesis. The trade unions, if they believe education is important for their workers, should investigate these areas and try to encourage more blue-collar workers to participate in continuing education.

The majority of the respondents were not involved in continuing education because of many deterring reasons. Some of the reasons, such as inconvenient meeting time and place, no time, lack of course information, need to take care of the family, appeared to be technical problems and could be handled by technical means. Trade unions might be able to tackle these problems by either providing technical solutions to these technical problems, for example providing childcare services to relieve the family duties of the workers, or working as an articulation agency to lobby the government policy to create favourable conditions for the workers to learn, for example to lobby for a maximum working hours, to lobby for tax exemption and to provide course information to their worker members.

One possible reason why blue-collar workers had a lower participation rate as compared to the white-collar workers was the lack of useful courses available in the

market. If the education providers operated their continuing education services strictly under the profit-making mentality, it would be much easier to make a profit, or at least to break-even, by providing training courses that can be operated in a mass lecture room with a high students to teachers ratio. It would be much more expensive to operate workshops with machinery and equipment and, in general, a lower students to teachers ratio due to space and safety requirements. It is therefore not surprising to find that there were many courses for Accounting, Book keeping, Management and Administration in the market but very little on automobile machinery and brick laying (Education and Manpower Bureau, 2004). Continuing education for blue-collar workers cannot be left in the hands of the market forces alone. As indicated by the interviews of the trade leaders in Chapter 7 that venues and equipment are critical to the types of programmes they can offer. “We either do not organise the training if we are not capable.” (Paragraph 73 of Appendix II by Mr. Leung Kai-Lik); “We cannot organise course when we have no space.” (Paragraph 142 of Appendix II by Mr. Chan Cheuk-Hay); “If we have more spaces, we can organise more courses.” (Paragraph 290 of Appendix II by Mr. Tam Yiu-Chung); “Practical courses take up most space.” (Paragraph 214 of Appendix II by Mr. Wu Tat). This could be another cross the trade unions have to bear: They should either encourage the government to organize such courses on a subsidy basis, or the trade unions have to organise such non-profit making courses on their own. It would be meaningless if the trade unions organised educational courses purely on a market force basis, as they will then simply become another educational provider.

The major weakness of this chapter is the failure of the methodology to differentiate technical problems from psychological problems. The deterrent factors named by the respondents were mainly technical problems that might be the reasons or excuses why they were not participating in continuing education. Superficial interpretation of the deterrent factors might lead to a rush of resources to provide technical solutions, without coping with the psychological deterrent factors hidden in the respondents’ mind. Psychological problems should be tackled by psychological means and the best solution is to prevent people from developing a “failure-to-learn” or “learned helplessness” mentality (Dweck, 1975; Craske, 1988; Galloway, Leo, Rogers and Armstrong, 1996). This suggests an intervention approach aimed at early education lives. In the next chapter, a group of trade union leaders were interviewed to investigate whether they identified similar educational issues facing the workers and what they are doing, or going to do, to assist these workers to learn.

Chapter 7 Interviews with the Trade Unions Leaders: Workers' Education Services of Hong Kong Federation of Trade Unions

As we saw in Chapter 5 that the Hong Kong Federation of Trade Unions (HKFTU) has been involved in workers' education since the post-war period (World War II). In summary, the HKFTU has played a very important role in workers education and still has the duty to advance the benefits of their worker members. As many members place very high expectations on the education of their children, the leaders of HKFTU must have a forward vision on the educational services that fit in to the future demands of the workers. The opinions of these leaders therefore play a pivotal effect on the education services of HKFTU in future. The purpose of this chapter is to study the opinions of the trade unions leaders on their present educational services and to explore their views for the future directions of the education services for their members.

Interviews with the leaders of HKFTU were organized to explore their opinions on different aspects of workers' education. As explained in Chapter 3, the interviewees included HKFTU leaders and operators. The list of interviewees is repeated here to facilitate understanding:

1. Mr. Cheng Yiu-Tong (Chairman of Hong Kong Federation of Trade Unions (HKFTU); Executive Council Member).
2. Ms. Chan Yuen-Han (Vice-chairman of HKFTU; Legislative Council Member; Chairperson of the Education Advancement Society for Workers in Hong Kong and Kowloon (EASW));
3. Mr. Leung Kai-Lik (Director of HKFTU Spare-time Study Centre);
4. Mr. TAM Yiu-Chung (Vice-Chairman of HKFTU; Legislative Council Member; Chairman of Employees Retraining Board; Chairman of Clerical and Professional Employees Association).

Moreover, two other non-HKFTU leaders who have been involving in the field of workers' education were interviewed to obtain opinions from other perspectives:

1. Mr. CHAN Cheuk-Hay (Principal of Hong Kong College of Technology)
2. Mr. WU Tat (Advisor to the Hong Kong Construction Industry Employees General Union).

The data collected was first analysed and summarized on an individual interviewee basis under the framework of SWOT (Strength, Weaknesses, Opportunities, Threats) analysis, PEST (Political, Economic, Sociological, Technological) analysis and Pareto analysis as described in Chapter 3. The summarized data were also compared to establish common and different views among the interviewees. The significance of the similarities and differences are discussed and conclusions are drawn from the discussion on each theme of what the union should do. The Pareto analysis was particularly useful for such comparison as it is a rather simple technique that asks the interviewees to choose the major obstacles that they are facing in term of the interviewing themes (which was “how to provide a better workers’ education services by the HKFTU”) in their perceived order of priority. By comparing the order of priority of the obstacles named by the interviewees, it is possible to gain insight on the respondents’ values, preferences, attitudes and beliefs.

7.1 Findings of the Individual Interviews

The data will be presented in several stages. In the first stage a SWOT analysis will be carried out and themes identified in the interviews that are common to several people and themes, which are particular to one or perhaps two individuals. This analysis will focus on the elements of the interviews, which were concerned with the ways in which the organization is responding to social demands, the micro-factors. In the second stage a PEST analysis will be carried out in the same way, identifying common and particular themes. The PEST analysis will present the material from the interviews, which was particularly focused on macro-factors. A summary of the interview with each individual will then derived to provide an overview of the contents of the interviews and also understands the position of each interviewee.

The third stage will be the PARETO analysis. The advantage of this is that it adds another dimension by focusing on issues that the interviewees thought could be the major problems. This will then highlight the possible actions, and probably their order of importance, that union leaders could take. This will provide insight into the union leaders’ future directions if they were given the task to improve the educational duties of HKFTU.

7.1.1 Interview with Ms Chan Yuen-Han (Paragraphs 2 to 35 in Appendix II)

Ms. CHAN Yuen-Han, Vice-chairman, the Hong Kong Federation of Trade Unions; Legislative Council Member; Chairperson of the Education Advancement Society for Workers in Hong Kong and Kowloon. Not surprisingly her interview raised important issues about need and demand, resources, qualifications and educational policy. From her perspective, each of these questions were contentiously ‘political’ and required new answers.

Table 7.1.1.1: SWOT from Ms. Chan Yuen-Han

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Efficient responsiveness to current market • Efficient responsiveness to workers’ demands • Sensitive to workers’ needs • Flexible time arrangement of course for workers • Course contents - entail essential skills • Entrepreneurial course - for starting business 	<ul style="list-style-type: none"> • Lack of financial resources • Lack of qualification accreditation • Lack of jobs in the market
OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> • Lack of recognition in the society of the qualifications

Table 7.1.1.2 PEST from Ms. Chan Yuen-Han

POLITICAL	ECONOMICAL
<ul style="list-style-type: none"> • Lack of recognition of courses • Poor financial management of the Vocational Training Council prevents fair and effective education for all • Government’s attitude towards vocational education being inferior to formal education • Government lack of effort in developing a sound vocational training system 	<ul style="list-style-type: none"> • Constantly Changing trends in the labor market – need to adapt

<ul style="list-style-type: none"> • Ignorant attitude • Inflexible personnel / official in charge of vocational training 	
SOCIOLOGICAL	TECHNOLOGICAL
<ul style="list-style-type: none"> • Increasing numbers of teenagers with education level below Form 3 • Attitudes of different people in the society towards vocational education 	

Ms Chan, during the interview, indicated that the ultimate aims of any service that the HKFTU provides are “.. to help workers and to uphold their rights in the society..” (Paragraph 5 of Appendix II). On the matter of educational services, the HKFTU acts to develop working skills among workers and to nurture self-improvement and self-renewal by providing workers with opportunities to gain experience in different industries.

According to Ms Chan, the most important strength of HKFTU’s education service is its efficient responsiveness to the market needs and workers’ demands (Paragraph 7 in Appendix II). Hence, it seems HKFTU’s education service is driven by two forces, one being the market needs, as determined by the number of jobs, and the other being workers’ needs, as indicated by the worker members. In this sense, HKFTU’s education service’s orientation is more on the responsive side to the two forces, and lacks a mid- to long-term direction. As will be illustrated, most of the interviewees reflected a similar view on workers’ education, i.e. that there is an unclear future direction of education and training for workers. Lack of financial resources is a major weakness of HKFTU’s education service (Paragraph 10 in Appendix II). This is a dilemma for the HKFTU, namely that course fees must not be expensive for workers while course costs are high. As also reflected by Mr. Leung Kai-Lik, course fees only cover a small portion of the cost. The HKFTU has not found a solution to this continuing problem.

Ms. Chan secondly pointed out a very important factor in workers’ education, which is qualification recognition (Paragraph 11 in Appendix II). A comprehensive qualification recognition system similar to the National Vocational Qualification in Britain is very much needed in Hong Kong. Although there is not yet a

comprehensive qualification recognition system in Hong Kong, Ms. Chan said this factor is an internal weakness and implies that HKFTU is weak in organizing recognized qualification attaining courses. Hence, even when there is a comprehensive qualification recognition system, HKFTU's education service might have difficulties matching the system.

Thirdly, Ms. Chan was very critical about the lack of effort the government and the Vocational Training Council have put on workers' education (Paragraph 25 in Appendix II). She was very dissatisfied with the work of the government and the Vocational Training Council, which are the bureaucratic structures (Paragraph 26 in Appendix II). She had complaints about the system and structure, the leadership and the attitudes. The interview demonstrated her qualities as both a leader and an advocate in the field of trade union education.

When asked about the obstacles preventing HKFTU from offering a better service, Ms. Chan claimed that the first and second obstacles both came from the government and the statutory body. She claimed that the government has to give recognition to courses and create job opportunities (Paragraphs 29 to 30 in Appendix II). For such change to happen, a key player who can work within the bureaucratic structure might be critical. In fact, Ms. Chan herself is a member of the Legislative Council (LegCo) and the HKFTU also has representatives in the LegCo. It is already easier for them to advocate for the change. Nevertheless, change does not seem to be coming and the reasons have yet to be studied.

The final point was funding. The problem of funding also limited the work of HKFTU's education service (Paragraph 31 in Appendix II). Not only the operation of courses, but also the fourth and the fifth obstacles (the lack of publicity about the value of vocational education and people's attitude towards it), are limited by financial resources (Paragraphs 32 and 33 in Appendix II). Publicity and public education could be organized or promoted by service providers instead of the government. However, the effects and results would be facilitated and more positive with the government's support. The lack of financial resources restricts the HKFTU from working in these areas and everything relies on the government which seems to have no initiatives.

It is not surprising that Ms Chan's views are strongly framed politically. Education is inescapably a political issue but there are times when fundamental questions about values and policies are relatively unimportant. This is not the case in Hong Kong at

the present time.

7.1.2 Interview with Mr. Leung Kai-Lik (Paragraph 36 to 92 in Appendix II)

Mr. Leung Kai-Lik is the Director of HKFTU Spare-time Study Centre. Mr. Leung provided a very detail account of HKFTU's education service. It was informative and thought provoking. Because of his work role, the focus of this interview was different covering such themes as: the purpose of workers' education, skills, motivation to learn and collaboration with other providers. These are issues that begin to stand out when educators are close to the practice of teaching and learning.

Table 7.1.2.1 SWOT from Mr. Leung Kai-Lik

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Mutual helping community - mobilization • Not demanding to student in terms of time and duration of courses (short-term courses) • Flexible courses according to workers' needs and demands • Low course fee • Flexible time • Provides basic learning opportunities not allowed in normal/grammar schools • No screening and discrimination of participants • Promote learning motivation • Hobbies/Interest courses • Members from different disciplines • Members teaching - mobilization 	<ul style="list-style-type: none"> • In time of heavy work and labour conflicts, classes could not be conducted • Limited resources to hire manpower • Service not implemented systematically
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Organize programmes that are not offered in Hong Kong with mainland university • Potential link up with higher education institutions • Changing view of continuing education (gaining recognition even in the education sector) 	

Table 7.1.2.2 PEST from Mr. Leung Kai-Lik

POLITICAL	ECONOMICAL
<ul style="list-style-type: none"> • The requirement to register as school • No direction yet of the government (education / adult learning / lifelong learning) • Rationale of officials • No complete conceptualization of such kind of service 	<ul style="list-style-type: none"> • Poor economy affects participants' learning motivation and participation • Not free service
SOCIOLOGICAL	TECHNOLOGICAL
<ul style="list-style-type: none"> • Composition of participants Changed (60%-70% of participants have received secondary education; about 20% are university graduates) • Less illiterate now • University graduates are not enough in the market nowadays • Increase in knowledge requirement • Increase in learning demand 	<ul style="list-style-type: none"> • Only able to organize with what HKFTU has or liaise with other professional organizations and mainland universities

According to Mr. Leung, HKFTU's educational services originated in 1946 "...with the purpose to help workers' children to learn and receive education.." (Paragraph 39 of Appendix II). Moreover, to provide opportunities for workers themselves to learn general knowledge and knowledge about their work in their employment position is another duty of the union.

Secondly, Mr. Leung also talked about transferable knowledge and skills at work. Moreover, the role of HKFTU is particularly important in a situation of high unemployment where workers cannot obtain training from employers: "... When there were periods which employers did not organize training to workers due to adequate manpower in the market.." (Paragraph 44 of Appendix II) but would need more knowledge and skills to find other jobs.

The third point Mr Leung raised was the question of policy of admission to and exit from courses. The HKFTU adopts an open-door policy in its education service: "... By providing the opportunities, no screening or discriminating, low course fee and flexible time slot, it is easy for workers to take the first step..." (Paragraph 48 of Appendix II). There is no screening of participants and the courses are flexible to the

needs of the workers. There are tailor-make courses to workers with special needs. Mr. Leung stressed the importance of providing opportunities for workers and to promote motivation to learn. This is a major characteristic of HKFTU's service. This principle is very similar to "education for all" and is a very distinct strength of the service. There is also open-exit policy parallel to the open-door policy for entry. It is not a poor policy for the service is directed towards providing learning opportunities and promotes learning motivation. However, it has to be carefully reviewed if the service is going to link up with other institutions and matching with the qualification system.

Fourthly, different from Ms. Chan Yuen-Han who focused more on politics and the failure of government and internal perspective Mr. Leung reported cooperation with external service providers as the opportunities of HKFTU's service (Paragraph 55 in Appendix II). However, the potential link up with higher education institutions was not really initiated by the education service of HKFTU; it was caused by a changing view of continuing education. This reflects its passive role in workers' education and in development. But Mr. Leung did not really speak of the threats to the service. This might reflect that Mr. Leung lacks a sense of risk or he is satisfied with the service.

The fifth issue is the question of resources. Limited resource is the major weakness of HKFTU's education service, which limits its operation as claimed by Mr. Leung (Paragraph 51 in Appendix II). Restricted by resources, the HKFTU could only organize courses according to their abilities. However, HKFTU's service seemed not proactive enough to explore potential resources such as fund bidding and opportunities such as cooperation or strategic alliance. This is a major weakness of the HKFTU's service that the service aims to meet workers' needs and demands but when they are incapable of meeting them, they give up (Paragraph 66 in Appendix II). Mr. Leung also mentioned that HKFTU's strategies are actually practical under the environment (limited resources) they are in. With a clear direction that they are not directing professional training, they are more capable to meet the demand by providing practical courses under the limited facilities (Paragraph 73 in Appendix II).

As a consequence, the service relies mostly on HKFTU's members' abilities to teach. Generally, the instructors do not have training in teaching but they usually are working in the field in which they teach and are experienced (Paragraph 70 in Appendix II). To Mr. Leung, qualification is not as important as dedication. This

is a good tradition but when the qualification system is established, it might become a potential hindrance.

The service now provides diversified courses for various purposes such as vocational oriented, general knowledge, interests and hobbies, etc. This wide coverage does match with the concept of “holistic learning” and could be advantageous in future development.

On the issue of obstacles, to Mr. Leung, government policy is a major obstacle affecting HKFTU’s service. Although the services are exempted from registration as in schools, there are still many restrictions and limitation. Mr. Leung considered the service not education (which in his mind has a much more restricted function), but a service providing opportunities for workers’ to learn which does not have too many restrictions (Paragraph 88 in Appendix II). It is a platform to promote learning motivation and enrich participants’ quality of life. It should not be viewed as a school and be governed by the school and education ordinances: “.. If the service is education to them, then it is put into mainstream and monitored under the traditional approach. Now it is life long, adult learning..” (Paragraph 59 of Appendix II). In this case, Mr. Leung argued that Lifelong learning should not be too regulated as it would restrict the flexibility and freedom of the organisers. He viewed government intervention as a big hindrance to the operation of the educational services of HKFTU, as they have to negotiate with the government occasionally.

7.1.3 Interview with Mr. Chan Cheuk-Hay (Paragraph 93 to 169 in Appendix II)

Mr. Chan Cheuk-Hay, Principal of Hong Kong College of Technology (HKCT) was interviewed. During this interview further issues emerged, each one reflecting the working context of the interviewee. In Mr. Chan’s case they covered issues on the regulatory framework of course provision, Changes in education and training markets and the longer-term position of the college. All were changing and in so doing were altering the ability of the organization to meet a wide spectrum of educational needs, especially among working people.

Table 7.1.3.1 SWOT from Mr. Chan Cheuk-Hay

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Strong vitality in difficult environment / situation • Does not rely on subsidies for operation • Ability to maintain low operation cost • Moderate, steady development strategies • Familiarity to public on adult education • Established networks • Long history - reputation established 	<ul style="list-style-type: none"> • Limited financial resources • Not enough full-time academic staffs/manpower
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Marketization / market competition • Inability of existing market sharers to occupy the market • Government policy in her position towards new comers • Discrimination reduced since 1997 • Poor management of some existing organizations / subsidy recipients 	<ul style="list-style-type: none"> • Marketization / market competition • Potential expansion strategies of existing market sharers • Government policy in her position towards new comers • Government's stress on market competition • Existing strong and large institutions

Table 7.1.3.2 PEST from Mr. Chan Cheuk-Hay

POLITICAL	ECONOMICAL
<ul style="list-style-type: none"> • Government funding determines the direction of continuing education • No subsidy • Government's stress on market competition • Government's direction on existing organizations and new comers • Increasing interference on further education • Government invest money according to planned economy 	<ul style="list-style-type: none"> • Poor economy • Uncertain period of recession • Reduction in people's economic abilities
SOCIOLOGICAL	TECHNOLOGICAL
<ul style="list-style-type: none"> • Population/Demographic Change 	<ul style="list-style-type: none"> • Expensive technology

The first issue of the interview is how Mr. Chan, as an outsider of HKFTU, viewed the educational functions of the HKFTU. Although Mr. Chan said the origin of HKCT was “Workers Night School” and had close relationship with HKFTU, Mr. Chan talked only very little about HKFTU’s service. He viewed HKFTU’s service as a means to maintain a relationship with members and to expand the network (Paragraph 95 of Appendix II) and did not mention anything about providing learning opportunities to the workers or empowering workers. Mr. Chan provided an outsider’s view of HKFTU’s educational service including to strengthen membership drive and to serve members. Mr. Chan provided little ideological account of workers’ education.

Mr. Chan had some mis-understanding of the service of HKFTU that the service targets in fact are not only trade union’s members: “.. HKFTU basically serve members and provide courses they can arrange according to members’ needs..” (Paragraph 95 of Appendix II). From workers’ night school, an upward movement of the institution had been observed. The upward movement refers to the upward levels of the target learners. The courses organized by the institution initially targeted at blue-collar and unskilled workers. Yet during the interview, it was indicated by Mr. Chan that the HKCT is looking into organizing college and even degree programmes for professional qualification. This could be an indication that workers are using educational opportunities to upgrade their educational attainment but in a sense there is less and less differentiation between HKCT, a college for workers education, and other ordinary tertiary institutions. However, the direction of HKCT is worth examining. On the one hand, Mr. Chan said government funded Employees Retraining programmes make up about 40% of all HKCT’s programmes, and these participants might be previously workers who are now unemployed. On the other hand, the direction of HKCT that Mr. Chan is driving at is more related to private self-financing university which is not directly catered for general workers (Paragraph 100 in Appendix II). The two require a clear vision and mission to achieve coordination.

The second issue mentioned by Mr. Chan is again, limitation of resources. Limitation of resources is mentioned as a problem to HKCT, especially for developing into a tertiary institution. However, Mr. Chan considered the ability to operate under deprived resources to be their strength (Paragraph 105 in Appendix II). Manpower is another internal weakness, as HKCT, similar to HKFTU, is obliged to recruit part

time human resources for teaching. Besides, market environment is an external factor and Mr. Chan has talked about the competition in the tertiary education sector. To Mr. Chan, the ability to survive in competition is one of HKCT's strengths. Familiarity to the public and the reputation the HKCT has established is an advantage (Paragraph 106 in Appendix II), but the familiarity will fade if marketing and publicity are not performed especially in the competitive environment as Mr. Chan described. As the reputations of those continuing education divisions of the public institutions spread, the reputation of HKCT would be ranked behind those institutions and familiarity would not be strength.

Mr. Chan emphasized again and again competition in the market as the threat as well as opportunity. However, he appeared confident about his ability to operate competitively as he spoke of the inactive institutions and the new comers to the market place (Paragraph 111 in Appendix II). To Mr. Chan, HKCT was capable and had the strategies to seize opportunities in the market though he did not explain about the strategies. He also mentioned about government policy as a potential, but Mr. Chan considered it was not an opportunity or threat at the time of interview.

The third issue described by Mr. Chan is the educational directions of HKCT. According to Mr. Chan, HKCT is moving forward to the goal of developing into a private self-financing university with whole day programmes (Paragraph 123 in Appendix II). However, whole day tertiary education programmes might require the workers to either work part-time or to stop working altogether. From the perspective of Mr. Chan, the direction of HKCT, should be whole day mainstream education; this is in fact not much difference as compared to other mainstream universities.

Mr. Chan, as a principal of an institution aiming at tertiary education for degree programmes similar to those offered by the existing universities, may not meet well the education needs of workers. Although the manpower need was not clear, Mr. Chan identified and empathized with the people with low education attainment and low skill level (Paragraph 126 in Appendix II). These people actually form a considerable part of the population and they are very much in need of educational support. HKCT would be a potential source of assistance to these people but they are no longer their targets.

The final point was government legislations and control. In terms of present legislative restrictions, Mr. Chan raised the education ordinance as an issue similar to

that affecting HKFTU but HKCT operated under the requirements of the ordinance. Flexibility in class size and various operations were sacrificed (Paragraph 139 in Appendix II). Again, the ordinance ought not be applicable to adult education and HKCT should advocate for deregulation.

During the interview, the overall impression was given that the HKCT had relatively poor, primitive facilities in terms of learning materials provided to students given its history of service. Mr. Chan considered resources as the most important factor affecting HKCT followed by manpower, government policies, and economic and structural population Change respectively. Mr. Chan, however, considered resources as an unsolvable issue but the reason why Mr. Chan considered external funding offered by the government not feasible was not clear. Even the government has restrictions and directions attached with the funding; they are the potential resources for HKCT.

Mr Chan's interview highlights the importance of viewing educational provision in the context of the resource constraints of the institutions that provide it. Macro policies to nurture lifelong learning may have wide support. But policies become meaningless without appropriate support at institutional levels so that courses can be delivered.

7.1.4 Interview with Mr. Wu Tat (Paragraph 170 to 236 in Appendix II)

Mr. Wu Tat, Advisor to the Hong Kong Construction Industry Employees General Union was interviewed. As explained earlier, his concerns focused on employment training issues (Paragraph 172 in Appendix II). It became clear very quickly, however, that such issues couldn't be separated off from matters concern employment rights and, in the longer term, the personal development of workers themselves. Mr. Wu was able to highlight that these wider issues have also to be understood against the background of the social and economic circumstances of workers and their families. What will interest workers in terms of education has to be relevant to their needs and circumstances.

Table 7.1.4.1 SWOT from Mr. Wu Tat

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Courses which focus on its industry • Courses popular • Organize according to members' needs • Members teaching 	<ul style="list-style-type: none"> • Insufficient places / venues for training
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Programmes subsidized by the government 	<ul style="list-style-type: none"> • Unemployment increases → no employment after training

Table 7.1.4.2 PEST from Mr. Wu Tat

POLITICAL	ECONOMICAL
<ul style="list-style-type: none"> • Government's deficit financial situation 	<ul style="list-style-type: none"> • Poor economic condition • Industrial reform. North move of manufacturing industries • Chan effect of poor economy
SOCIOLOGICAL	TECHNOLOGICAL
<ul style="list-style-type: none"> • Unemployment from different occupations / even professionals • Workers are worried about the future of Hong Kong → reduction in confidence, sense of risk developing caused by rumours and uncertainties 	<ul style="list-style-type: none"> • Technological advance requires professionals, instead of workers

The first issue as mentioned by Mr. Wu is educational ideology. Mr. Wu was more focused on value added abilities. According to Mr. Wu, education and training were to assist workers to better perform in their positions. This was also a reactive approach by providing what the market needs.

Mr. Wu raised an important aspect of workers education, which is empowerment (from Paragraphs 175 to 176 of Appendix II). It is important to educate workers about their rights and the ordinances concerning their rights. Workers' willingness to learn more to equip themselves is important to the provision and organization of workers' education. That is, organization of workers' education should provide direction and guidelines to the participants. It should not be just meeting workers' job-related needs or market needs, but should have vision and direction. This

argument is very similar to the concept of Jane Thompson mentioned in Chapter 2.

Secondly, Mr. Wu highlighted the ways to survive under limited resources. According to Mr. Wu, workers' motivation to learn is the strength of HKFTU's educational services (Paragraph 179 in Appendix II). But again, Mr. Wu mentioned the problem of not enough resources, especially for training places. However, as almost all of the courses were based on workers' needs that were not really profitable at all, Mr. Wu perceived no or little external threats (Paragraph 187 in Appendix II). Mobilization of members in teaching was perceived as strength.

Mr. Wu's perspective was more grassroots: that workers' concerns were with immediate needs and these needs were comparatively primary, such as employment security and salary level, which are related to economy. Political issues to worker were secondary against the background of difficult economic situation.

7.1.5 Interview with Mr. Tam Yiu-Chung (Paragraph 237 to 324 in Appendix II)

Mr. TAM Yiu-Chung, Vice Chairman of HKFTU; Legislative Council Member; Chairman of Employees Retraining Board; Chairman of Clerical and Professional Employees Association agreed to be interviewed. From his position it is not surprising that the wider regional context of workers' education came into view and that the immediate demands of a Changing labour market would be seen as having more importance than wider debates about the philosophy and practice of lifelong learning. This interview highlighted the need to see all aspects of Change in education and training in Hong Kong as being related to the profound Changes taking place in the former colony's relationship with China.

Table 7.1.5.1 SWOT from Mr. Tam Yiu-Chung

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Good network system • Large member size - >300000 • Wide coverage of location – 170 associated unions • Low course fee • Practical courses • Known to public - no need to publicize • Low administrative cost • Self-owned properties • Course popular 	<ul style="list-style-type: none"> • Weak connection with participants • Not enough manpower
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Government values the concept of lifelong learning • Allotted funding for continuing education • Elderly and retired people (Population aging) • Uncommon courses 	<ul style="list-style-type: none"> • No obvious competition now, but might only be able to organize interest/hobby courses in long run • Government's selection of service providers (preference to tertiary institutions) • Unable to share resources

Table 7.1.5.2 PEST from Mr. Tam Yiu-Chung

POLITICAL	ECONOMICAL
<ul style="list-style-type: none"> • Government selects continuing education divisions of the eight universities • Government had no intention to assist (Laissez-faire) • Occasional interference on contents • Government match the service with regular schools which are strictly regulated 	<ul style="list-style-type: none"> • Poor economy • Long working hours • Unstable earnings
SOCIOLOGICAL	TECHNOLOGICAL
<ul style="list-style-type: none"> • Broad range of knowledge in different disciplines instead of in-depth knowledge (especially the youths) • Looking for official qualifications 	<ul style="list-style-type: none"> • E-learning might affect service (mode of teaching) in future

- | | |
|---|--|
| <ul style="list-style-type: none">• People's preference to work as white collars; perceived tough and hard work as a worker | |
|---|--|

Mr. Tam presented the evolution of HKFTU's service, which had been evolving, from basic knowledge and job skills focus to personal development focus. With better education by the government, expectation of the learners increased. However, Mr. Tam still regards the service as a second Chance learning opportunity for workers instead of lifelong learning (Paragraph 239 in Appendix II). This showed how HKFTU position itself in workers' education that although personal development had become the focus, the service had not evolved to where lifelong learning should be the model for it.

Mr. Tam mentioned the needs arising from the market, particularly of working in Mainland China (Paragraph 242 in Appendix II), but he did not mentioned about what workers' needs would be. Mr. Tam saw potential or developing needs for workers to work in the mainland but questions like whether most workers are willing or prepared to work there in the mainland, and what workers' concerns would be working in the mainland were not examined.

According to Mr. Tam, HKFTU had strength in an extensive network and membership which would help it develop (Paragraph 245 in Appendix II). The direction of education development from Mr. Tam's point of view was also market driven, showing, perhaps, because of the immediate demands of his role, a realism that, in the longer term, may not be too helpful to the wider aim of broadening out the meaning and purpose of workers' education.

Mr. Tam claimed that the weak connection between HKFTU and participants was a very big limitation and weakness: "... our connection with participants is weak that they usually read the information about the courses and then apply. After taking the course, they just leave.." (Paragraph 248 of Appendix II). HKFTU did not utilize its extensive membership to develop probably because of weak connection between HKFTU and members, and among members. Manpower would always be one weakness but HKFTU's did not put enough effort in maintaining close connection with participants which most unions would focus on.

Mr. Tam saw the opportunities for development, in the field of education for the elderly, due to change in the population structure as people live longer (Paragraph 260 in Appendix II). His observation might have originated from his work in the Elderly Commission. This idea is close to prevailing models of Lifelong learning and should be viewed as a service for retired workers to enrich their life. The core service in training workers for their vocational needs should still be in focus, however.

HKFTU's service actually matched with what Mr. Tam said about the trend of having a broad range of knowledge for participants. HKFTU's courses are comparatively cheap and short-term which is good for participants to get a wide range of knowledge. However, Mr. Tam also pointed out that participants were requesting higher-level courses and he doubted HKFTU's position in the field (Paragraphs 263 and 264 in Appendix II). A closer examination of the trends would be helpful for HKFTU's longer-term development.

Mr. Tam saw a need for skilled workers in Mainland China. Skilled workers were actually more needed in the mainland than in Hong Kong as most of the manufacturing industries were moving to the mainland (Paragraph 275 in Appendix II). Education and training to train skilled workers diminished, as there were so many workers out of jobs. There were so many skilled workers in different industries when manufacturing industries were flourishing. As more and more manufacturing industries moved to the mainland, lots of skilled workers were obliged to change to occupations which they were not trained for. Mr. Tam's wish was for the government to take up the training responsibilities for manpower (Paragraph 274 in Appendix II).

Another key theme raised by Mr Tam concerned curriculum. His view was that there was no coherent curriculum in the courses offered by HKFTU and the programmes relied on the instructors to give whatever they were able to (Paragraph 280 in Appendix II). This he saw as a potential obstacle for qualification accreditation of the training courses (Paragraph 302 in Appendix II). Yet if the external demand was to have qualifications, the benefits and the value added from receiving training with recognized qualifications really help workers to find or secure jobs, which were their basic needs, claimed Mr. Tam (Paragraph 308 in Appendix II).

This interview was telling: it highlights the key problems of providing forms of learning for adults that are focused on personal development – a key aim of lifelong learning in the international debates about this idea – and the immediate practical

demands of labour markets for particular kinds of expertise. In Hong Kong there is an additional problem: that of the export of manufacturing jobs to Mainland China. This simultaneously increases the demand for skills but devalues the importance of acquiring them for workers not prepared to move.

7.1.6 Interview with Mr. Cheng Yiu-Tong (Paragraph 325 to 348 in Appendix II)

Mr. Cheng Yiu-Tong, Chairman of Hong Kong Federation of Trade Unions (HKFTU); Executive Council member was interviewed and contributed to this research. Mr. Cheng stressed the importance of vocational education. He also presented his view of vocational education that it should be of the same importance with normal secondary grammar education. He discussed his views about the inadequacies in the education system: that there was a gap between school and work and that students of grammar schools were not equipped with enough vocational skills. Students who could not follow regular education had few opportunities to continue learning. Workers who could not attain university degrees seemed to have limited prospects (Paragraph 328 in Appendix II). HKFTU's education service sought to bridge the gap and provided opportunities to workers with low achievement in regular education to learn. Mr. Cheng also argued that the lack of recognition in vocational qualifications made it more difficult for workers to face the challenges of economic Change (Paragraph 328 in Appendix II).

Table 7.1.6.1 SWOT from Mr. Cheng Yiu-Tong

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Long history of service • The largest trade in Hong Kong • Established and operates like a community • Adjusts to market Changes and workers' needs • Instructors easily found • Instructors/mentors would assist participants in entering to the industries • Good relationship with mainland China and other countries worldwide • Cooperation with mainland China and overseas unions and institutions of programmes with recognition of corresponding government 	<ul style="list-style-type: none"> • Limited resources • Relatively high operation cost but low tuition; difficult to maintain budget balance • Still only a small portion of courses are recognized

<ul style="list-style-type: none"> • Large membership; extensive network and stable yet eager participants • Cooperation with local institutions of credits earning courses • Leisure and interest courses and training that cultivate participants' culture and spiritual needs • Federation of unions; lots of cooperation and instructors are closely in touch with the market and industries • Participation in different government committees • More than 30 study centres in different districts 	
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Cooperation with China is the opportunity for service development and for our members 	

Table 7.1.6.2 PEST from Mr. Cheng Yiu-Tong

POLITICAL	ECONOMICAL
<ul style="list-style-type: none"> • Government's lack of policy and focus on vocational education • Lack of government's effort in establish a system of qualification recognition system that takes in vocational education 	<ul style="list-style-type: none"> • Difficulties faced in adjusting courses offered under structural Change in economy • Poor economy and high unemployment rate lead to overall decrease in enrollment • Globalization makes lots of work skills and techniques Change
SOCIOLOGICAL	TECHNOLOGICAL
<ul style="list-style-type: none"> • Continually Changing demands from participants such as the needs to learn different foreign languages 	<ul style="list-style-type: none"> • Advancement in technology makes workers need to learn new skills

From the evolution of HKFTU's education service, HKFTU had a history of spotting the gaps or inadequacies in education and had organized courses according to the need it identified. It had established certain scale and it had initiated cooperation with overseas and mainland institutions to organize programmes to workers (Paragraph

331 in Appendix II). The service had a lot of strengths, but still, its resources had limited its development (Paragraph 335 in Appendix II). Moreover, the fact that only a few portion of the courses were recognized also affected the service. Even if there were the qualification system, the service had to examine its direction of development because all the courses and participants had to go through standardized examinations for qualification and that implies getting the course material and instructors accredited and screening of participants: all of these requires additional financial resources (Paragraph 336 in Appendix II).

During the interview, Mr. Cheng seemed to use market demand to represent more the demand from participants (i.e. the learners) instead of the market/industrial demand (i.e. the employers) (Paragraphs 339 and 340 in Appendix II). Participants demand would be influenced by market/industrial demand. For example, more people enroll in mandarin classes, as it has become a required skill by different industries. It would be of the same importance to communicate with employers regarding their needs and wants. HKFTU had lots of connection with different unions and workers but it appeared to lack of connection with employers. It is perhaps the nature of Hong Kong employers that they pay relatively little attention to workers' training and make little contribution to the work of training institutions.

Mr. Cheng indicated that there was a general reduction of enrollment in the educational programmes offered by HKFTU. The reduction in enrollment, as claimed by Mr. Cheng was due to economic downturn and unemployment (Paragraph 343 in Appendix II) (which was also indicated by Mr. Leung Kai-Lik during his interview). This claimed would need to be studied carefully. Workers need to upgrade themselves to compete with the adverse market situation. There would be reduction in those leisure and interest courses but the enrollment of vocational oriented courses would be increased.

This interview raises key issues highlighting once again the need to think of the work of HKFTU in the light of its historical achievements as well as its current context. The context is changing fast constraining the kinds of courses that can be made available. There is a constant struggle to balance the short term with the long term. How that is resolved depends on how key leaders within HKFTU's interpret the role of Lifelong learning in the future.

7.1.7 General Observations of the SWOT Analysis of Individual Interviewees

Obviously, the leaders had identified a lot of strengths in their education service. However, these leaders identified comparatively fewer weaknesses. Except Mr. Chan Cheuk-Hay's interview, which he presented more from HKCT's perspective, all other interviewees were able to give accounts of HKFTU's education service.

Most of the respondents viewed lack of resources as their major weaknesses. It is obvious that any operations require resources and the shortage of resources would be a definite factor for impairing better services. Yet it would also be possible for the interviewees to focus too much on it and being masked off from other weaknesses.

As there were many institutions providing adult education on a market fee basis without government subsidies (for example, Caritas, YMCA and various continuing education programmes from many universities), the issue of why some of the students choose the other service providers rather than HKFTU must be addressed.

Unfortunately none of the views on weaknesses in the interviews were based on opinions of the service users instead of a full analysis on HKFTU's competitors.

Opportunities and threats of the SWOT analysis pointed to the problems or chances facing the organization. To solve such problems or to capture such opportunities refers to work that has to be done in the future and requires forward visions of the interviewees.

Regarding to opportunities, all of the interviewees (except Ms Chan Yuen-Han she did not elaborate on this area) either focus on changing government policy or on the possibility of exploring the strong ties of HKFTU to China. In a way the interviewees only focused on opportunities and threats external to HKFTU: all of these factors are external to the operation. There were no details on how to make use of the brotherhood or bonding among the working members. Similarly the comments on threats (except Mr. Cheng Yiu-tong and Mr. Leung Lai-Lik that they did not elaborate on this area) also focused on market and external factors without looking into internal threats (for example, lack of social cohesiveness in sustaining the bonding of the students after they completed their courses, lack of network with other educational bodies etc). Many opportunities and threats facing HKFTU may be tackled by working with other social partners. Some of the interviewees pointed out that they can work with China, cashing their good connection with China officials. However there was not much on local social partners or professional bodies for example might be

willing to devote their expertise and knowledge for workers training (Mr. WU Tat mentioned about looking for professionals as teachers, but not professional bodies as social partners, Paragraph 175 in Appendix II). These areas should be explored in the future so that HKFTU do not need to handle all problems alone.

7.1.8 General Observation of PEST Analysis of Individual Interviewees

In the interview, the interviewees expressed their opinions in terms of PEST and there were some interesting similarities and differences among their opinions.

As pointed out in chapter 3 the use of PEST analysis is particularly effective in analyzing macro-environment in which the organization is. These macro-environmental factors usually are beyond an organization's control while changes in the external environment also create new opportunities. This differs from the use of SWOT tables because SWOT analysis is more concerned with identifying an organization's internal operational, resource and organizational strengths and weaknesses as well as key external opportunities and threats facing the organization: a more organization centred microscopic approach.

The PEST analysis centered on four external factors, political, economical, sociological and technological, that may affect the operation of the organization, that is HKFTU in this case. There are of course more than just the four factors but the acronym PEST represents the most commonly macroenvironmental factors that people used (Middleton, 2003).

In the political factor, for example, none of the interviewees recognized the government's adoption and promotion of Lifelong learning. There was no intention of the interviewees to make use of the government's funding, for example Quality Fund and Continuing Education Fund to finance their programmes. The main thrust of comment on political aspects was on resources allocation and lack of governmental direction. At least one of the interviewees, Mr. Leung Kai-Lik, preferred the government not to interfere the operations and hence not to impose regulatory requirements for the HKFTU programmes. On the other hand, both Mr. Cheng Yiu-Tong commented that the government had no clear policy on workers education.

Most of the interviewees pointed out that unfavourable economic conditions would

reduce the number of student enrollment. Such economic factors would probably affect those courses with high tuition fees, and would worsen the impact of poor economy as indicated in earlier chapters that education might be able to increase competitiveness which ultimately would increase employability. It is possible that when the economy recovers, those people who could afford tuition fee during the poor economy condition would benefit from the economy upturn because they had taken the opportunity to learn while those that could not afford the tuition fee during the poor economic condition would not be able to capture the economic upturn as they had not taken the opportunity to learn while the economy was poor.

Mr. Tam Yiu-Chung indicated that many people nowadays preferred to work as white-collars and discriminate against blue collars. Such “job discrimination” attitude might influence the type of training courses provided as many students would then prefer to enroll on programme tailed for “white collars” and smaller number of students would enroll on “blue collar” training courses.

Other than Mr. Tam Yiu-Chung, who mentioned the impact of E-learning on the service industry, none of the interviewees elaborated on the technological impact on workers education. It was a bit surprising as Hong Kong is moving towards a knowledge society, while less and less labour intensive works are available, it is important to integrate technology advancement in workers education. Mr. Wu Tat mentioned that technology is for professionals, not workers. The statement might undermine the need of technicians, which are the technological basis for many professionals.

7.2 Cross-Referencing of the Comments from SWOT and PEST Analysis

SWOT and PEST analysis were carried out, on an individual basis as discussed in the previous section, by grouping comments from various interviewees under the framework items of Strengths, Weaknesses, Opportunities and Threats (for SWOT) and Political, Economical, Sociological and Technological factors (for PEST). Themes were then identified in the interviews into those that are common to several people, and into those that are particular to one or perhaps two individuals.

For SWOT analysis, the items under strengths, weakness, opportunities and threats are focused on the ways in which the organization is responding to social demands, that is the micro-factors. For PEST analysis, the items under political, economic, sociological and technological are intended to focus on macro-factors. On the other hand, although the interviewer designed the questions under the SWOT and PEST format, the questions were open-ended and the interviewees were free to answer the questions with responses that might fit into more than one item in the SWOT/PEST analysis or different interviewees grouped similar ideas in different items under the SWOT/PEST format. For example, Chan Yuen-Han named “Lack of recognition of qualification” as a threat under the SWOT format while Chan Yuen-Han also named the same element, together with Cheng Yiu-Tong, under Political factor under the PEST format. On the other hand, a related element named by Tam Yiu-Chung “People looking for official qualification” was grouped as Sociological item under PEST analysis.

The themes identified common to more than three or four interviews were therefore discussed together by pulling similar comments either from SWOT or PEST analysis with little regard to the artificial differentiation of whether they belonged to micro- or macro- factors. The key issue in the interviews is to initiate discussion by using the backbone framework of SWOT or PEST analysis as a start.

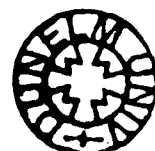


Table: 7.2.1 Strengths (Cross-Referencing)

Efficient responsiveness to market demands	Chan Yuen-Han, Wu Tat, Cheng Yiu-Tong
Efficient responsiveness to workers' demands	Chan Yuen-Han, Leung Kai-Lik, Wu Tat, Cheng Yiu-Tong
Sensitive to workers' needs/Familiarity to public on adult education	Chan Yuen-Han, Chan Cheuk-Hay, Cheng Yiu-Tong, Leung Kai-Lik
Flexible time arrangement of course for workers with short term courses	Chan Yuen-Han, Leung Kai-Lik
Course contents – entail essential skills	Chan Yuen-Han
Mutual helping community - mobilization /members teaching	Leung Kai-Lik, Wu Tat, Cheng Yiu-Tong
No screening and discrimination of participants	Leung Kai-Lik
Promote learning motivation	Leung Kai-Lik
Members from different disciplines/Established networks/Long history with established reputation	Leung Kai-Lik, Chan Cheuk-Hay, Tam Yiu-Chung, Cheng Yiu-Tong
Strong vitality in difficult environment (with little overhead)/Does not rely on subsidies for operation/Low administrative cost and low course fees	Chan Cheuk-Hay, Leung Kai-Lik, Tam Yiu-Chung
Wide coverage of locations	Tam Yiu-Chung, Cheng Yiu-Tong
Good connection with China	Cheng Yiu-Tong
Participation in different government committees	Cheng Yiu-Tong

Table 7.2.2 Weaknesses (Cross-Referencing)

Lack of financial resources/insufficient places or venues/Not enough manpower	Chan Yuen-Han, Leung Kai-Lik, Chan Cheuk-Hay, Wu Tat, Cheng Yiu-Tong
Lack of qualification accreditation	Chan Yuen-Han, Cheng Yiu-Tong
Lack of jobs in the market	Chan Yuen-Han
In time of heavy work and labour conflicts, classes could not be conducted	Leung Kai-Lik
Service not implemented systematically	Leung Kai-Lik
Not enough full-time academic staffs/manpower	Chan Cheuk-Hay
High operation cost with low administrative fees	Cheng Yiu-Tong

Table: 7.2.3 Opportunities (Cross-Referencing)

Organise programmes that are not offered in Hong Kong with mainland university	Leung Kai-Lik, Cheng Yiu-Tong
Potential link up with higher education institutions	Leung Kai-Lik
Gaining recognition even in the education sector/Discrimination reduced	Leung Kai-Lik, Chan Cheuk-Hay
Poor management of some existing subsidy recipients (viewed as opportunity for HKFTU if the government withdraw its financial support with potential acceptance of new operators).	Chan Cheuk-Hay
Programmes subsidized by the government	Wu Tat
Government values the concept of Lifelong Learning	Tam Yiu-Chung
Elderly and retired people	Tam Yiu-Chung
Uncommon courses	Tam Yiu-Chung

Table: 7.2.4 Threats (Cross-Referencing)

Lack of recognition in the society of the qualification	Chan Yuen-Han
Government's stress on market competition/acceptance level of the new operators	Chan Cheuk-Hay
Failure to compete in the market due to lack of competitive advantages	Chan Cheuk-Hay
No employment after training (due to poor market)	Wu Tat
Government's preference to tertiary institutions	Tam Yiu-Chung
Course might shift to non-carrier oriented programmes due to future competition on career-oriented courses	Tam Yiu-Chung
Unable to share resources	Tam Yiu-Chung

Table: 7.2.5 Political (Cross-Referencing)

Lack of recognition of courses/lack of qualification recognition system that takes in vocational education	Chan Yuen-Han Cheng Yiu-Tong
Poor financial management of Vocation Training Council – prevents fair and effective education	Chan Yuen-Han
Government's attitude towards vocational education being inferior to formal education	Chan Yuen-Han
Government lack of effort in developing a sound vocational training system/or lack of policy and focus on vocational education	Chan Yuen-Han Cheng Yiu-Tong
Inflexibility of management in-charge of vocation oriented programmes	Chan Yuen-Han
Requirement to registered as schools and therefore being inflexible under the present school regulations	Leung Kai-Lik
No direction of government's policy on Lifelong learning	Leung Kai-Lik

Government's funding determines the direction of continuing education	Chan Cheuk-Hay
Government invest money according to planned economy	Chan Cheuk-Hay
Government's financial deficit impaired its commitment on workers education	Wu Tat
Government had no intention to assist workers' education (Laissez-faire)	Tam Yiu-Chung
Government prefers the service with regular schools which are strictly regulated	Tam Yiu-Chung

Table: 7.2.6 Economic (Cross-Referencing)

Constantly changing trends in the market	Chan Yuen-Han
Poor economy affects participants' learning motivation and participation (long working hours and unstable earnings)	Leung Kai-Lik, Chan Cheuk-Hay, Wu Tat, Tam Yiu-Chung, Cheng Yiu-Tong
Industrial reform – moving out of manufacturing from Hong Kong to China	Wu Tat
Difficulties faced in adjusting courses offered under structural change in economy	Cheng Yiu-Tong
Globalisation - work skills and techniques need to change	Cheng Yiu-Tong

Table: 7.2.7 Social (Cross-Referencing)

Increasing numbers of teenagers with education level below F.3	Chan Yuen-Han
Increase of knowledge requirements	Leung Kai-Lik
Less illiterate	Leung Kai-Lik
University qualification are not good enough in the market	Leung Kai-Lik
Workers are worried about their future with less confidence	Wu Tat
Unemployment is being common	Wu Tat
Board range of knowledge needed instead of in-depth knowledge	Tam Yiu-Chung
People looking for official qualification	Tam Yiu-Chung
People's preferences to work as white collar	Tam Yiu-Chung
Continually changing demands from participants	Cheng Yiu-Tong

Table: 7.2.8 Technological (Cross-Referencing)

Advancement in technology demands workers to learn new skills	Cheng Yiu-Tong
E-service might affect service (mode of teaching) in future	Tam Yiu-Chung
Technological advancement requires professionals, instead of workers	Wu Tat
Expensive technology	Chan Cheuk-Hay

The following themes appear in more than three or four interviews. As these themes are identified by the interviewees, that is the leaders of the trade unions, they could be included and addressed as the agenda items in the future roadmap of the trade unions' educational strategic plan. On the other hand only one person or perhaps two mentioned some points. In this case the particular position of that person and their views meant that their points were not shared or at least mentioned by others. These arguments were also integrated under the items of the following themes with detail description of how the views were not agreed with other interviewees.

7.3 Efficient Responsiveness to Market Demand (Chan Yuen-Han, Wu Tat, Cheng Yiu-Tong)

The three interviewees highlighted the ability and the importance of HKFTU to organize programmes that were quick to respond to the market demand. All of them highlighted the fact that their educational programmes were largely organized to meet the market demand. Yet there was little discussion on how to match with the market demand, for example nothing on market research, market projection or direct communication with the employers. It appeared that most of the envisaged actions were reactive, stemmed mainly from the demands from the workers, rather than proactive to the manpower requirements from the market.

Many interviewees, on the other hand, also highlighted the fact that it is getting more and more difficult for the HKFTU to organize programmes that are responsive to the market demands. For example, Wu Tat referred to the challenge of the poor economy in general, "It is difficult to know what industries and what levels of job are better in the market as every levels of work are poor now." (Paragraph 200 in Appendix II).

7.4 Efficient Responsiveness to Workers' Demand (Chan Yuen-Han, Leung Kai-Lik, Wu Tat, Cheng Yiu-Tong)

When comparing the opinions among the interviewees, it is possible to generalize that most of the strengths they identified on the existing HKFTU educational services were flexibility and quick responsiveness to the needs of the workers. The interviewees who made specific reference to the ways in which the courses respond to workers' needs emphasized the practical nature of the courses. Tam Yiu-Chung said, "... the courses are practical and continuing developing." (Paragraph 245 of Appendix II), and "We are more informal, trying hard to fit participants' working hours, and consider their needs when we plan..." (Paragraph 239 in Appendix II), this was supported by Chan Yuen-Han who gave an example of the training for truck drivers, "... the FTU have provided courses for truck drivers to teach them how to pass through immigrations" (Paragraph 7 of Appendix II). On the other hand it was also pointed out that workers' needs are not only practical and connected with their trades but they also need courses for leisure. Leung Kai-Lik for example said that "There are courses focusing on skills training, but also courses on personal interest and hobbies, and culture" (Paragraph 76 of Appendix II). The HKFTU now provides diversified courses for various purposes such as vocational oriented, general knowledge, interests and hobbies. This wide coverage does match with the concept of holistic learning as described by Hellyer and Schulman (1989) as described in Chapter 1, section 1.3.

Mr. Wu raised an important aspect of workers' education, which is empowerment, "We educate workers how to fight for their own entitled rights." (Paragraph 176 of Appendix II). It is important to educate workers about their rights and the ordinances concerning their rights.

7.5 Sensitive to Worker's Needs/Familiarity to Public on Adult Education (Chan Yuen-Han, Chan Chuek-Hay, Cheng Yiu-Tong, Leung Kai-Lik)

The observations in this theme are very similar to previous themes on "Efficient Responsiveness to Market Demand" and "Efficient responsiveness to Worker's Demand". Chan Yuen-Han and Cheng Yiu-Tong both gave numerous examples to illustrate how HKFTU organized courses in response to the workers' demand (Paragraph 7, 16, 48, 332 of Appendix II) which demonstrated the sensitivity and proximity to the workers' demands. This may be due to the fact that the unions are closer to the workers and, as profit-making is not their major purpose, they could organize training programmes without too much concern on the profitability of the

programme. At the same time, with their extensive network, it is not difficult for them to locate skill workers or helpers to provide training instructions.

Chan Cheuk-Hay went further to comment on HKFTU's responsiveness to the workers' education as their tool to maintain or extend HKFTU's influence on the workers, "HKFTU, also through this method, to maintain its relationship with members and also to expand its membership network." (Paragraph 95 in Appendix II). In this context, education services that are designed to the needs of the workers are not only a service but also a survival requirement for the trade union.

7.6 Mutual Helping Community – Mobilization/Members Teaching (Leung Kai-Lik, Wu Tat, Cheng Yiu-Tong)

Following the previous comment that educational services of HKFTU are important for the survival of the trade unions (that is to build up network and relationship), the other side of the argument is that a good network and relationship could enhance the teaching ability of the HKFTU's programmes. Leung Kai-Lik, for example, mentioned that HKFTU relied on members to teach (Paragraph 48 in Appendix II). This is important because the tutors are workers that might have first hand, and therefore more practical, knowledge on the working conditions as indicated by Cheng Yiu-Tong, "We cooperate with different unions because the instructors are working people in the corresponding industries and are in touch with the market." (Paragraph 343 in Appendix II). Another implication is that the tutor fees would be cheaper as mentioned by Wu Tat, "We charge just some fees to the almost volunteering instructors" (Paragraph 187 in Appendix II) and is more flexible in terms of hiring and retrenching instructors, "If there is no needs from workers, we just do not organize courses." (Paragraph 187 in Appendix II).

Therefore it is perceivable that mutual helping community, networking/relationship, and responsiveness to the workers' demands are inter-rated to each other. These features could be the uniqueness, and perhaps also the competitive advantage, of the HKFTU's educational services.

7.7 Members from Different Disciplines/Established Networks/Long History with Established Reputation (Leung Kai-Lik, Chan Cheuk-Hay, Tam Yiu-Chung, Cheng Yiu-Tong)

Many interviewees highlighted the fact that the union has the strength through its networks. Leung Kai-Lik for example mentioned that “The union had members from different disciplines, different industries and different rank of workers, ... and the union mobilizes members to teach. Course fee is low as a result of this” (Paragraph 47 of Appendix II). Chan Cheuk-Hay also agreed that good network is important for vitality or survival of the system (Paragraph 105 and 107 in Appendix II).

7.8 Lack of Financial Resources/Insufficient Places or Venues/Not Enough Manpower (Chan Yuen-Han, Leung Kai-Lik, Chan Cheuk-Hay, Wu Tat, Cheng Yiu-Tong)

All of the interviewees indicated that the lack of resources, either financial, technological, manpower or venues impaired the development of workers’ education. The lack of resources not only affects the supplier side, but also the motivation of the workers to learn as explained in the discussion on the theme of “Poor Economy Affects Participants’ Learning Motivation and Participation.” (Section 7.11 of this Chapter).

7.9 Lack of Qualification Accreditation (Chan Yuen-Han, Cheng Yiu-Tong, Tam Yiu-Chung).

Ms Chan Yuen-Han highlighted the weakness of HKFTU in failing to offer a recognized qualification to their students, “the lack of a mechanism that allows workers to gain recognized qualification..” (Paragraph 11 of Appendix II). The lack of qualification recognition was referred to both as a market need by Tam Yiu-Chung, “ Also the mainland has a set of qualification, if workers in Hong Kong who want to work in mainland might need to consider how to adapt to this set of assessment” (Paragraph 242 of Appendix II), as well as a mandate to formalize vocational education, “We stress system to render mandate to the vocational qualification... thus making the development of Hong Kong education system in two directions.” (Paragraph 336 in Appendix II).

The lack of qualification system may be a consequence of one of its strengths: a quick

response to the market. A quick response to the need of the workers does not allow a careful quality assurance system to be installed as it will take time for careful course design and validation. Besides the quick responses rely on skilled workers and helpers already available in their network, rather than recruiting professional instructors with proper qualification that are essential for recognition by other professional bodies.

7.10 Lack of Government Policy (Chan Yuen-Han, Cheng Yiu-Tong)

Chan Yuen-Han reckoned that the Government is not providing sufficient guidelines and directions which lowered the social status of vocational education. The criticism extended from lack of qualification system (Paragraph 19 of Appendix II), poor or lack of vocation training system (Paragraph 25, 26 and 30 of Appendix II), poor governmental attitude towards vocational education (Paragraph 29 of Appendix II). Ms Chan is openly dissatisfied with the work of the government and the governmental arm of vocational training, the Vocational training Council. It showed her characteristics of a leader in trade union and as an advocate. Cheng Yiu-Tong also agreed that there is a lack of government policy towards workers education but he sees it as an opportunity to shape the government policy as it is not present at this moment, “We will continue to advocate to the government for a systematic qualification accreditation system with comprehensive recognition by different industries” (Paragraph 346 in Appendix II) and “...actively moving/driving the union to match with the government Advocating the government ...” (Paragraph 347 in Appendix II).

On the other hand, Chan Cheuk-Hay criticised the government adopting a policy that centered too much on certain industries and intervening in the operations of continuing education, “The government believes those industries which should have development and the public should study following these directions. Then she subsidises further study in those areas and this is not healthy development.” (Paragraph 117 in Appendix II) and this intervention was derived from the government’s different funding policy, “The government invests money but the flow of these money are decided by some committees and these committees decided what industries receive the assistance.” (Paragraph 117 in Appendix II). The situation as viewed by Tam Yiu-Chung was that the Government indeed had a policy on workers’ education, that is to leave it for free market (*Laissez-fair*), “The government, in this area of learning, views that you would develop and organize by your own.” (Paragraph 258 in Appendix II).

7.11 Poor Economy Affects Participants' Learning Motivation and Participation

(Leung Kai-Lik, Chan Cheuk-Hay, Wu Tat, Tam Yiu-Chung, Cheng Yiu-Tong)

Many interviewees observed that there is a negative effect of poor economy towards learning participation. Both Leung Kai-Lik and Wu Tat tended to relate these phenomena to financial burden, "Although the course fee is already low, we still need to charge the participants." (Paragraph 89 in Appendix II); "There are also some people who have financial problems and cannot study." (Paragraph 233 in Appendix II). Tam Yiu-Tong, on the other hand, suggested that the situation was also related to working conditions in the time of poor economy, "Workers now have longer working hours and their earnings are not as stable that people's interest to learn would be affected." (Paragraph 260 in Appendix II); ".. as the employment is not stable, people have to put focus on their work first and put other things aside in lower priority." (Paragraph 320 in Appendix II) and "For Men, they probably have to work very hard for their work and therefore they have fewer chance to have training and learning." (Paragraph 321 in Appendix II). Cheng Yiu-Tong in addition highlighted the effects of poor economy on selection of training courses: Career oriented programmes would displace leisure related courses, " .. people will calculate and they will not apply those which are not needed immediately such as dancing class....People will apply courses related to occupation, more urgently needed and equipping themselves." (Paragraph 343 in Appendix II). Chan Cheuk-Hay pointed out the dilemma of the workers in the time of poor economy, "Those who are poor cannot afford to receive education and will be marginalized more and more... the general public will fall into a vicious cycle that polarization will become serious." (Paragraph 114 in Appendix II).

Other than the above analysis that are directly extracted from the tables of SWOT and PEST, there are other common themes that are identified following the interviews:

7.12 Low cost (Chan Cheuk-Hay, Leung Kai-Lik, Tam Yiu-Chung):

These three interviewees put emphasis on the low cost of providing course and therefore the possibility of charging low fees.

While Chan Cheuk-Hay and Tam Yiu-Chung mentioned that they could provide cheap fees: "Our operations have maintained at relatively low cost." (Paragraph 105 in Appendix II); "The course fees are cheap." (Paragraph 126 of Appendix II), only

Leung Kai-Lik indicated a sustainable mean to maintain a low school fees, that is to organise short course instead of long-term programmes, without either trading in quality or relying on community services of their members. For example Leung Kai-Lik said, “.. the fees charged are short term based which required less from the workers..” (Paragraph 47 from Appendix II).

7.13 Integration of the themes identified by the SWOT and PEST analysis with the Themes of the Thesis

The themes as identified by SWOT and PEST were further related to the common thread of themes as discussed in the previous Chapters. They are lists as below:

7.13.1 Challenges to the Workers

As pointed out in Chapter 2 (section 2.2) and Chapter 4 (section 4.5), the workers in Hong Kong are facing enormous challenges. The interviewees reiterated the challenges as described in Chapter 2 and 4. The challenges are multi-pronged namely shifting of manufacturing firms to Mainland China (Mr. Tam Yiu-Chung), the general challenges of globalisation (Mr. Tam Yiu-Chung) and the poor economy in Hong Kong (Mr. Chan Cheuk-Hay).

The trade union leaders are trying to assist the workers to face these challenges mainly through mutual help and vocational oriented training programmes. Yet it is not enough just to deliver career-oriented training programmes, Wu Tat in particular mentioned that training on empowerment is also needed as the workers could learn how to stand firm for their rights (Paragraph 176 in Appendix II). Leung Kai-Lik also mentioned the need for knowledge transfer from one industry to another industry according to the market demand (Paragraph 44 in Appendix II). They also named Lifelong learning as one of the possible approaches for the workers to handle such challenges. Mr. Tam Yiu-Chung also highlighted the possible migration of workers to match with the movement of the industries. He suggested the workers to move together with the industries, which is to work in China (Paragraph 275 in Appendix II).

Changes in economic structure had created impacts and challenges not only to the workers but also to HKFTU's service. It was agreed by all of the interviewees that there had been constant changes in the economy and it would be difficult for the service providers in course design and organization. Although all of the interviewees

had clear vision in upgrading workers' vocational skill to face the challenges posed by the market changes, there is no immediate solution of how this can be done.

7.13.2 Education and Employment

As mentioned in Chapter 4 (section 4.6) that governments of many countries reckoned that education have a great impact on career development. Chapter 2 (section 2.2) also mentioned that many Hong Kong teenagers looked for a job or a better future life as their aim of studying (The Hong Kong Federation of Youth Groups, 1999). Hong Kong data, as mentioned in Chapter 2 (section 2.2), indeed indicated that higher education attainment tended to have a correlation with secured employment (Report on Manpower Projection to 2005, 2000).

During the interview, all of the interviewees also agreed that education is important to enhance employment opportunities of the workers. It was also agreed that helping the workers for a better employment is the duties of HKFTU. Consequently all the interviewees regarded education service as the priority services of HKFTU.

7.13.3 Limitation of the Present Education System

Earlier Chapters, Chapter 4 (section 4.4) in particular, highlighted the limitation of the present education system to cater for the educational needs of the workers. In the interviews, the interviewees all expressed their discontent with the present education system. In fact one of the major reasons that HKFTU organized their educational services was to compensate for the limitation of the present education system. Mr. Cheng Yiu-Tong in particular highlighted the fact that there are a large portion of workers that are at only Form 3 level and these workers suffered a lot due to the progressive demands of knowledge and education from the changing market. The government simply fails to cater for the educational need of this group of workers. (Paragraph 328 in Appendix II). Mr. Cheng goes on to criticize the fact that many workers with low educational attainment are actually bright in turn of their vocational abilities. They are handicapped in a sense that the present education system is not providing this group of able workers an alternative route for recognition such as vocational qualification.

So far the present economic situation coupled with the education system remained discriminative to the workers: Those who needed training most could not afford the time or the fees to be trained. The present system also failed to provide a qualification

framework to the many courses and programmes attended by the workers.

7.13.4 Resources Allocation

Chapter 4 (section 4.7) argued that the resources allocation policy of the government funding directs the development of various policies including education. All the interviewees named the government funding direction as the major key to the future of workers education and Lifelong learning. Low cost, although named as one of HKFTU's major educational features, it is more than a survival necessity rather than a preference. Related to the financial resources are factors also mentioned by the interviewees: lack of training space, relies on worker members to teach instead of professional trainers. The impact of financial allocation not only restricted to the service provider but also to the workers. As poor economy was named to have a negative effect on learning participation, extend of government funding to assist the workers may increase participation rate.

Chan Cheuk-Hay in particular highlighted that those who are poor will be marginalized and have less chance to learn (Paragraph 114 in Appendix II). Although HKFTU have been able to provide learning programmes that with low school fees, there is a limit on how low the fees can be. Besides the workers might be deterred to learn due to longer working hours and have no time to participate in learning. Resources would need to be allocated from other sources to overcome such problem.

Many of them agreed that the resource allocation policy of the government has a great impact on the future directions of workers education. It is therefore perceivable that the union leaders will continue to lobby for government funding towards workers education.

7.13.5 Agency of Change

Chapter 5 (section 5.3) explained the agency role of HKFTU to induce changes for the advancement of their members. Chapter 6 (section 6.5, 6.6 and 6.7) highlighted various motivation and deterrent factors facing the learners. The agency role is made possible, as indicated in the interviews, because HKFTU has the strength through its extensive networks and the fact that many union leaders are now in very influential positions. They may be able to lobby for an educational system, or to provide supporting services, to handle the deterrent factors and to strengthen the motivation factors.

Indeed most of the interviewees highlighted the important duty of HKFTU to bring along changes to the workers through its educational duties. Ms Chan Yuen-Han for example stated that, “..the FTU acts to develop working skills among workers and to nurture self-improvement and self-renewal by providing opportunities to gain experience in different industries.” (Paragraph 5 in Appendix II). Therefore HKFTU regards that it is their duties to provide educational services to develop working skills, nurture self-improvement, brings in empowerment. They are therefore willing to be the change agent to bring in improvements for the workers’ affair through education. So far HKFTU alone is bringing the changes to its fellow members through low cost education, quick response to the market and workers’ educational needs. There is no obvious effort in employing workers education to support the consciousness-raising activities to help workers to identify themselves as members of the labour-selling class workers (Hellyer and Schulman 1989; Barbash, 1955; Hopkins, 1985).

There are limitations to the present educational services from the HKFTU, the major ones include the lack of resources, the lack of recognition from the public towards vocational education and the lack of a qualification accreditation. These obstacles have to be resolved as soon as possible.

Following the interviews with the union leaders, there are at least three approaches to initiate change to the system. One is to deliver courses by continuing monitoring the need of the market; the other is to serve as an advocate and, using its political influence to demand a better operation or more funding from the government. The third approach is to work with the government, and other parties for a better educational system.

7.13.6 Lifelong Learning

Chapter 4 (section 4.6) argued that the most important transferable skill is the ability and the desire to learn. The concept of Lifelong learning, as described in Chapter 1 (section 1.1), was therefore reiterated and, as argued in Chapter 4 (section 4.6) that, Lifelong learning should be promoted and included in the educational agenda of the educational service providers.

Tam Yiu-Tong regards the services of HKFTU served as a Second Chance for the workers to learn. His idea of the educational services of HKFTU should be market-driven, delivering courses that have immediate application value. In his

context, the intention of the workers to learn were in fact being forced to learn instead of being in love with learning.

Recurrent education, as described in Chapter 1, is “the distribution of education over the lifespan of the individual in a recurrent way”. (OECD, 1973, cited in Jarvis, 1995). Lifelong learning may serve the function as Second Chance but it is really a continuing effort for life. In fact the services of HKFTU now provide diversified courses for various purposes such as vocational oriented, general knowledge, interests and hobbies and this wide coverage matches with the concept of holistic learning but the It might not be accurate to say that learning intention of the workers is totally career or work oriented. In a sense, continuing education or Lifelong learning may be more than just career-oriented learning as a mean to cope with market demands. Though it is obviously that market demand is a major driving force for Lifelong learning. To encourage people to participate, the practical value of the learning programmes may need to be emphasized. This view is shared by most of the interviewees.

Almost all of the interviewees highlighted the changing knowledge demand of the market which in turn directly or indirectly supported the need of Lifelong learning. Ms Chan Yuen-Han in particular highlighted that “...FTU acts to develop working skills among workers and to nurture self-improvement and self-renewal..” (Paragraph 5 in Appendix II), whilst Mr. Cheng Yiu-Tong also mentioned that the purposes of HKFTU’s education services are to: “..organize training courses and provide Lifelong learning opportunity to workers..” (Paragraph 327 of Appendix II).

Unfortunately there were different understandings on the meaning of markets. According to Ms Chan Yuen-Han, the FTU will continue to provide educational services that are suited to the concurrent needs of the labour market (Paragraph 22 of Appendix II), in this case, “market” referred to the labour market of the various industries. On the other hand, Mr. Chan Cheuk-Hay viewed market requirements as the needs of the students (Paragraph 95 of Appendix II); Mr. Cheng Yiu-Tong also referred market demand as demands from the students “.. If we feel the market demand is large, we organize..” (Paragraph 339 of Appendix II). It is therefore possible that the various interviewees have different interpretation of making a course to fit into the market demand.

Some may refer to output demand (from the labour market) and some may refer to input demand (demands from the student intake). Yet no matter whether it is the

output or input demands, both of them are affecting the concept of Lifelong learning. A changing output demand requires continuing modification of a learner's skill and knowledge and therefore brings in the concept of Lifelong learning. Feeling the need to learn more and differently would then impose a need for the educational organization to offer new courses: Lifelong learning therefore affects input demand.

Yet if the educational organization is targeting on satisfying input demand, the response time to the output demand would be longer. By the time the student graduated, the market might not be what they perceived while they joined in the training programme. Unless of course the syllabus not only centered on trade skills but also provided training on self-learning and to foster the concept of Lifelong learning. This issue were also highlighted by Mr. Tam Yiu-Chung: “ ..The government now more value the concept of Lifelong learning and this is exactly what we advocate like second chance learning and Lifelong learning..” (Paragraph 251 of Appendix II), and Mr. Wu Tat: “..Through further study, they want to be able to keep up with the industrial demand..” (Paragraph 231 of Appendix II).

7.14 Pareto Analysis

This thesis is concerned with the past, present and the future of the educational duties of HKFTU. The SWOT and PEST analysis highlighted the internal and external factors, as perceived by the union leaders, facing or influencing the educational activities of HKFTU.

Some of these factors especially the strengths and weaknesses (of SWOT) factors are the outcome of many years of development. It provides some insights on the past and the present situations that shape the educational approaches of HKFTU today. The opportunities and threats (also from SWOT) factors requires the union leaders to view into the future: basically on how to capture the opportunities and how to avoid or handle the threats under the influences of various external or macro factors.

The macro factors that referred to were highlighted in the PEST analysis under the items of Political, Economic, Sociological and Technological factors. The whole interview exercises starting from SWOT format and PEST format enabled the union leaders to clarify what they thought were important issues facing the HKFTU education services in the past and in the present. What lies ahead, however, is largely dependent on how the union leaders devote their energy in solving the problems or

taking advantages of possible solution in the priority activities in their own mind.

The Pareto analysis was made to identify the major obstacles, as perceived by the union leaders, of those obstacles affecting future improvement of the HKFTU's educational services. Assuming that the obstacles must appeared in the mind of the leaders before it would become an agenda item of the leaders' future educational direction, the Pareto analysis might point into what lie ahead for the leaders to handle.

It is fairly common to think of something like Pareto Analysis as a problem-solving tool, but, in fact, it is not. As was explained in Chapter 3, it is a tool that is often used to help determine what problems to solve and in what order. It therefore points to the order of priority, in terms of degree of importance, as viewed by the interviewees. It therefore somehow reflects the value of the interviewees towards the interviewing theme, that is, workers educational services by HKFTU in this case.

Table 7.14.1 Pareto Analysis Table

	Obstacles Listed by the Interviewees with Order of Priority (1 being most important, 5 being the least important)				
Interviewee	Obstacle 1	Obstacle 2	Obstacle 3	Obstacle 4	Obstacle 5
Ms. Chan	Government's attitude – Vocational inferior to formal – recognition – create job opportunities for workers	Existing structure of vocational education with mainstream education (not dynamic and interwoven)	Lack of funding and resources; difficulties in resource allocation (HKFTU)	Lack of publicity of the value of vocational education	Attitudes of stakeholders (workers, employers, parents) towards vocational education (narrow and inflexible now)
Mr. Leung	Government policy on this kind of service (education?!). Requirement to register	Poor economic environment (lowered participation)	Attitudes and rationales of the education sector and officials.	Union's internal direction (the union has clear direction)	
Mr. Chan	Resources and Manpower	Government policy	Change in economy	Change in population structure	
Mr. Wu	Industrial / Economy reform	Government's deficit financial situation; courses not organized / not matched with the needs (Open Institution)	Poor economy / Economic recession	No direction of development (what industries and what kind of human resources are needed in future)	Family burdens in addition to no government assistance → destroyed motivation
Mr. Tam	No government policy in the area; no direction of development	No official qualification accreditation system	Bias/preference in resource provisions		
Mr. Cheng	Government policy and system - lack of focus on vocational education	Lack of a qualification accreditation system that involve vocational skills training	Structural Change in economy		

Four out of six interviewees (Ms. Chan Yuen-Han; Mr. Leung Kai-Lik; Mr. Tam Yiu-Chung and Mr. Cheng Yiu-Tong) named government policy as the top obstacle impairing them to offer a better workers education. Mr. Wu named rapid industrial reform was the top obstacle while Mr. Chan Cheuk-Hay named lack of resources as the major obstacle. The other obstacles were either in terms of resources shortage or market factors (such as poor economic conditions, change in population structure etc) that the unions virtually have nothing to control with. It was therefore natural to conclude that the major immediate approach they could generate from the Pareto analysis is to work with or lobby with the government, hoping they could steer the governmental policy and perhaps with a bit of funding towards their direction of workers education.

7.15 Summary of the Chapter

In summary, a thread running through the interviews was that the key leaders were very instrumental and market-driven in their outlook. In a sense this was not good, as the leaders should have a wider vision of Lifelong Learning instead of simply being reactive to the market demands.

The Pareto analysis as perceived by the union leaders, highlighted the major problems facing workers education: resources constraints and regulations (government regulations or quality regulations). The emphasis on market factors, resources and government direction tended to mask off the uniqueness of HKFTU and turn it into just another commercial operation of adult education. The other side of a lack of rigid ideology is the flexible and practical approach towards educational services.

The Pareto analysis also highlighted the possible action of the union leaders that is going to take in the future: in short, to work with the government, through possible lobbying for more resources and a central qualification accreditation system.

In this chapter, through interviewing the leaders of HKFTU and others, we have a better understanding of the possible educational approach of HKFTU in the future. Based on the leaders' opinions, the future educational roles of the HKFTU (which already embraces the concept of Lifelong learning), would stress on making use of the

strengths (strong network, flexibility, low cost operations for example) and overcoming the weakness (lack of funding, lack of accreditation and qualification framework etc) in order to cope with the future threat (competing for the limited resources, providing a sustainable educational services with recognizable qualification awards) and to capture the opportunities (cashing in the relationship with China government and the political and bargaining strength of HKFTU).

In order to advance the educational standings of HKFTU, the present major obstacles such as the uncertain changes of the government policy, resources constraints and encouragement of the workers to participate in education would need to be addressed first. Yet in the longer term, the leaders should re-think about their ultimate aims of their educational services rather than being led by the market.

In the next chapter, the findings and arguments from all the chapters will be discussed and integrated into conclusions on the educational duties of the Hong Kong Federation of Trade Unions.

Chapter 8 Discussion and Conclusion

This thesis reviewed the situations and problems in term of workers' education, and the opinions and profile of those who participated in continuing education from Chapter 4 to Chapter 6. The data collected from those who participated in continuing education revealed that self-improvement, improvement of skills and to fulfil interest as the three most important motivation factors for continuing education (Figure 6.12); whereas the interviews with the union leaders, in Chapter 7, seems to view vocational function as the top requirements of their educational services. The mismatch may be caused by the apparent lack of direct communication between the education users and the providers. It is highly advisable that the education provider should establish a communication linkage with the learners, perhaps in the form of a focus group for better market research on the needs and wants of the service users.

As indicated in Chapter 4, many parents place a top priority on education; in fact many of them place an even higher priority on their children's education than their own. It is therefore a matter of establishing a hierarchy of policy objectives in which "education" not only becomes the answer to the demand of the members of HKFTU for this generation, but also for their children; in addition, it is also about the response of HKFTU to far-reaching socio-economic changes in advanced societies. With this background situation analysis in mind, the interests and motivations of workers in Hong Kong today were investigated in Chapter 6 – and compared with earlier investigations to see if there is any change over time – and the opinions of the union leaders were investigated in Chapter 7.

The trade unions in Hong Kong traditionally provide broad social, including educational, services to their worker members. Hong Kong Federation of Trade Unions (HKFTU) being the biggest trade unions in Hong Kong demonstrated well its involvement in these social services. After many years of its establishment, however, there is certain important educational direction of HKFTU that has to be re-addressed. The aims of the present study have been to investigate the challenges facing the workers in Hong Kong, the possible roles and effects of education that assists the workers to face the challenges, the reason why the present education system is not sufficient for assisting the workers, how the trade unions perceive their educational roles and what could be done in the future for the advancement of workers' education.

Hong Kong does not have a Labour Party, and HKFTU officially is not a political organisation and yet it is the closest organisation to a Labour Party in Hong Kong. In

addition to the large number of members that gives a rather influential power to HKFTU, it has a long pro-China history that is particularly important after the change over of Hong Kong from the British government after 1997. Many of the leaders, after the changeover of sovereignty in 1997, have taken on important positions in the political arena in Hong Kong. The influence of HKFTU on governmental decisions, including the government's educational policy, cannot be underestimated.

The provision and development of continuing/vocational education by the HKFTU is a reaction to a number of changes and situation (i.e. sociological, political, economic and technological) in the unique history of Hong Kong. The further development up till now, and probably beyond, is also a reflection of the unique of the HKFTU and the social condition (Strength, Weakness, Opportunities and Threats). These two models are the backbone of the analysis of the interviews with Trade Union leaders.

The study identified three major issues from different types of analysis and it is to these that we return now.

8.1 Challenges of the Workers Today

The study started off by reviewing the development of workers' education in Hong Kong through literature and other secondary sources. The secondary research data indicated that the workers in Hong Kong are facing enormous challenges, globalisation generally, with intensified competition specific to Hong Kong: The restructuring of the economy, namely the shift from secondary to tertiary-based industries, coupled with the competition of a cheaper supply of labour from Mainland China intensified the problems facing the workers. The trend could be worse in the near future as Hong Kong has already experienced 7 of its 50 year "two systems period" under the "One Country, two systems" arrangement. By 2047, there will be "One Country one system" and there might be no more barriers for a massive supply of manpower from the Mainland China.

Apart from the geographic and political factors above that are unique to Hong Kong. Hong Kong workers are also facing market challenges that are common to many other countries. For example, the increasing complexity of industry demands for a more highly skilled workers, which intensifies the need of regular updating of skills and knowledge. Related to this development is the consistent pressure to improve efficiency and to upgrade quality to meet highest international standards. All of the

union leaders agreed that training is important for the workers to maintain their competitiveness. In this regard, training for those in future employment will cease to be seen as a luxury and will come to be regarded as a necessity. As it is the moral obligation for HKFTU to take care of the welfare of its members, it is important for the HKFTU leaders to diagnose the changing markets and assist the workers to face these challenges accordingly.

8.2 Effects of Education on Employment

Chapter 1 reviewed the evidence on the strong correlation of employment with education attainment. Coupled with the challenges the workers face today, it is naturally deduced that one way to help the workers facing the challenges is to provide proper education that meets the market requirements. Chapter 1 however also outlined the difficulty of organising educational programmes that are tailored for the specific requirements of the market. One of the reasons is that the market is changing quickly: once you learn a skill, the skill cannot last long for the market is changing. This observation was also mentioned by some of the union leaders, for example, Mr. Wu Tat in Chapter 7; the other reasons include the time gap between learning the market demand and the time taken to plan, design, implement the training programme and of course the time taken for the learners to learn the skill. Chapter 1 therefore argued that the design of the training programmes should not be market driven, as it is too reactive. The training programmes should be ideally designed ahead of the market. There might be a chance in which a worker learns some skills that is not required by the future market, yet if the workers can continue their learning effort and modify their learning directions, they have a better chance to evolve and change together with the market. This concept of Lifelong Learning puts an emphasis on the continuing acquisition of knowledge.

Chapter 1 therefore brings in the concept of Lifelong Learning and argues that Lifelong Learning is closely related to workers' education. It is then obvious that HKFTU should place Lifelong Learning in the centre of its educational agenda.

8.3 Limitations of the Present Education System

Chapter 4 indicated that the present education system is largely influenced by the attitudes and opinions of the government. Careful examination of the present system

suggested that the system is not favourable to the workers and workers education in Hong Kong is mainly organised under a functional approach as controlled by the resources allocated by the government.

Chapter 4 and 5 further suggested that there are certain signs of influences of social and cultural capital on education, which is reinforced by the present education system. HKFTU has therefore a role of an articulation agency to help shape an education system that is more suitable to the workers.

The telephone survey in Chapter 6 of those participating in continuing education reflected that many Hong Kong people already have a high propensity to participate in continuing education. This is in line with the strategy of instilling the concepts of Lifelong Learning to assist workers today to meet with the challenges of the changing market. Unfortunately there is a disturbing sign that blue-collar workers had a lower continuing education participation rate. Some of the deterrent factors are related to the social resources and some are related to their lack of appreciation of learning. Easier access to Lifelong Learning is essential, if technical professionals or workers are to assume more responsibility for their own career development, and their employers are to remain competitive in an increasingly technology-based global economy.

One of the major shortcomings of the present system on continuing education is that many of the programmes are market-driven, therefore reactive rather than proactive, and operated by private institutions on a user pay basis. Those who could not afford the time and school fees would not be able to join the programme and be excluded. Those programme that are either costly to operate (for example need a workshop for practical training) or have too few intakes also cannot be operated. For those courses that rely heavily on equipment, the HKFTU leaders must somehow lobby for sources of funding other than the fees. Coupling with the fact that workers' education should be related to work, that is the real working situation, there comes the argument for a tripartite cooperation in which the Government (with financial support), HKFTU (education service provider with workers network) and the commercial firms (for industrial attachment) must work together to provide a proper educational opportunity for the workers. This issue is further discussed below in the sections of government (section 8.5.1) and social partners (section 8.5.2).

HKFTU, in order to assist their members unions would need to convince the workers to participate more in continuing education; and to assist the workers to overcome the resources constraints. Organising programmes that appear not to have immediate

application would not be able to attract learners on a user pay basis and HKFTU might need to convince the Government to provide financial subsidies for such programmes.

Another limitation of the present education system refers to the constraints of the educational services delivered by HKFTU. In Chapter 7, it was indicated by the union leaders that most of the training from HKFTU lacked certification. This lack of certification made it difficult to place a value on the training, particularly when a worker was moving between industries.

8.4 The Leaders of Workers Education

Chapters 5 and 7 outlined the various problems and opportunities for the trade unions with respect to their educational services. Chapter 5, in particular, highlighted the opportunities of trade unions to make advantages of its increasing political bargaining power to shape future educational policy of the government. Chapter 7 further investigates how the leaders of workers education perceive their roles and future activities in these areas. There were several important insights from the leaders. First of all, they all agreed that education is an important duty of the trade unions and that limitation of resources is a major obstacle that has to be overcome. The leaders maintain that they are closer to the market and can offer better “practical” training programmes to the workers, and in addition, they indicate the need for a qualification accreditation for their programmes in order to attract the learners. As Chapter 4 already explained that the major financial resources on education are the government, and noting that financial constraint was the major obstacle to offering educational services in Chapter 7, HKFTU should work with the government: seeking financial support from the government to fund workers education, or to use its political influence to modify the education agenda for an education system that caters better for the needs of the workers.

Regarding qualification accreditation, it is indeed an important component for promoting the Lifelong Learning concept. With a view to an efficient and flexible education system, it is important for HKFTU to ensure that its learning programmes, be it formal or informal, are appropriately recognised. In addition, it is important to develop schemes for assessing and recognising knowledge and skills acquired outside the formal education system. Again the accreditation system must be adopted and implemented by the government. HKFTU should negotiate with the government and to provide advises to the government on the qualification accreditation.

Chapter 7 (section 7.13.5) argued that the present educational services provided by HKFTU centered mainly on working skills. There is no obvious effort in employing education to raise consciousness for the workers to bring about social changes to the working class. This area would need to be addressed for the future educational direction of HKFTU.

8.5 Proposed Approaches for HKFTU's Future Educational Duties

Following the study, it is possible to recommend certain approaches for HKFTU to consider in terms of their educational duties in the future. The key concept is that HKFTU must continue to embrace the concept of Lifelong Learning in order to help the workers meeting with the changing market. They should realize and explore the potential of education, not only to expand the employability of the workers, but also to induce social changes as described by Thompson. As discussed in Chapter 2 that adult education, according to Thompson (1997), is about helping people to acquire really useful knowledge and the people who needed most are those who are denied access to the benefits of society and the levers of power. How HKFTU would develop a clear and critical ideology, curriculum and programme of study to tackle such a major educational issue remains to be seen. The following suggestions arising from the earlier chapters are what the HKFTU could tackle in the short term, whereas in the long run the organization must derive its own ideology that could assist its members to explore their full social potential.

8.5.1 Work with the Government

It is the government's task, through direct involvement or through social policy, to provide people with opportunities for obtaining information and knowledge and for growing into capable citizens. HKFTU should ensure the opportunities should be equal for the working class. It is also the concern of the government to reconcile the demands of various stakeholders, as described in Chapter 4, in order to maintain the stability of the society. HKFTU being the largest trade union in Hong Kong should represent the workers to bargain with and work with the Government to safeguard the interest of Hong Kong as a whole.

The Education commission, again as explained in Chapter 4, in which the Government appointed all the members of the commission determines the major

education policy in Hong Kong. HKFTU should therefore ask for membership of the commission so that the views of HKFTU could be expressed in the Commission. Many of the following suggestions on the roadmap depend on the relationship between HKFTU and the government. Gaining the membership to the club (i.e. Education Commission) is essential to push forward the education agenda of HKFTU.

8.5.2 Work with the Other Social Partners

The major challenge to HKFTU is to create a framework that encourages collaboration among different sectors – the targeted youth group (or in other languages, the future workers) is simply too large and a single body would be too overwhelmed with the task. HKFTU could not afford to exclude engagement of other sectors, especially their future employers: the business sector. Without coordination and collaboration among sectors, their distinctions can prove highly problematic when addressing complex issues such as unengaged youth: the sectors end up with distinct and uncoordinated strategies for addressing the problem that produces redundant activities and that work at cross-purpose.

Unfortunately as described in Chapter 3, the Small and Medium Enterprises (SME), which employ about 40% of the total workforce are not actively engaged in regular training programmes. HKFTU has to convince these stakeholders of the Hong Kong population that it is in their interest to support workers education. To enlist the support of the business community, HKFTU would need to argue that employers have a special responsibility in supporting workers education. Their support of workers' education actually would create an industrious class of men and women who are knowledgeable and add to the Hong Kong's economic well-being. Chapter 6 and 7 indicated that some workers could not participate in continuing education while the economy is poor. To encourage higher participation rate in education, the government might consider financial support to motivate learners and to remove the deterrent factors. Tax support of workers education could be a possible solution. Chapter 5 argued that in this context, tax support is actually an investment that would yield high dividends in the form of public safety, progress and prosperity.

8.5.3 Social Services to Encourage Participation of Continuing Education

Coupling the findings of deterrent factors of learning in Chapter 6 with the observations of the leaders in Chapter 7 that poor economic conditions might affect

the participation rate in continuing education, HKFTU should provide social support, for example child-care centre and late hour tutoring, to facilitate those learners to participate in continuing education. With the extensive network and service outlets, HKFTU is in a good position to offer territory-wide social services.

8.5.4 Multiple Exit and Entry with Credit Transfers

Remedial and bridging programmes could also be organised to provide multiple entry opportunities for learners to enter into the educational system. Meanwhile, the Government has accepted the key recommendations of the Education Commission made in May 2000, which were made after a comprehensive review of the entire education system. One of the main objectives is to develop a diversified, multi-channel, multi-layer higher education system. A key component of this system is a “flexible and transferable credit unit system (section 8.4.6 and 8.4.30 of the Education Commission Final Report, May 2000), the prerequisite of which is a comprehensive qualifications framework in which “qualifications are mutually recognised and transferable among various continuing education/formal education/professional/vocational training programmes” (section 8.5.7 & 8.5.8). Chapter 7 (section 7.9) indicated that qualification serves both as a market need as well as a mandate to formalize vocational education. Chapter 6 (section 6.6) suggested that “No Time” is the major deterrent factor that hinders people from continuing education. Combining these two together, a flexible arrangement such as multiple exits and entry educational system with credit transfer can accommodate the need of the working learners. Multiple entry and exit points provides the flexibility for the students to learn, stop, and then continue to learn at their own pace. They do not need to be locked up in the classroom for two-three years while employment opportunity is jumping up and down outside the school. They can accumulate their credits through various time gaps between their busy work schedules. Intrinsic to the credit transfer system is of course qualification recognitions of the credits.

Chapter 2 argued that too much emphasis on tertiary education induces “Qualification Inflation.” With a system of multiple entries and multiple exits, together with qualification credit transfer, as highlighted by the union leaders in Chapter 7, the learners do not need to rush into tertiary education as their educational priority. Vocational or skill-based learning, with a qualification transfer system, can provide the learners with credit accumulation. Vocational education, and with the same basis of workers’ education, are therefore not dead-ends in education.

Under the system, students should receive accumulation of credit points with respect to the number of courses they completed and the credit points would be recognised by other tertiary institutions at home and abroad. If the students want to, these credit points might help them to gain entrance to the other tertiary institutions. During the study period, vocational guidance and advice will also be provided. As the credit points are accumulative. Students can stop their school life to capture employment opportunity without forfeiting their credit points. They can take up their study again at a later time for further credit accumulation, for entry to universities or just to upgrade their knowledge.

Efforts of the school to increase individual options of students are of little avail if a large proportion of entry-level occupations lead to dead ends. The first step in increasing individual options of all is the development of additional career ladders so that any person who enters an occupation at an entry port has opportunities to progress toward occupations that provide increased responsibilities and challenges.

As many primary and secondary pupils would like to proceed into higher education, especially university degree courses (Wong, 1997), the direction of higher education would have a pivotal role for other education sectors. People might be discouraged to enroll in sub-degree or vocational programmes, not because of the quality or career prospects of the training programmes but because of the mentality of worshipping degrees. The very limited of progressing programmes of further education of the present vocational education course offered by the Vocational Training Council, partly because of the reluctance of cooperation from the local universities, has been strongly criticized (Chan, 2001). Bridging routes will have to be developed for the students. With the good relationship of HKFTU with the institutions in China, mutual accreditation and recognition is not difficult. This development is also in-line with the present trend of integration with the markets of Mainland China.

8.5.5 Embracing the Concept of Lifelong Learning

General observation in Chapter 7 was that the leaders' view of workers' education was largely in the context of adult education under the framework of the existing continuing education services. Instead, learning now starts to be conceived as a lifelong process with important connections established between schooling, higher education, workplace learning, and colleges for the older age learners.

It is perhaps important to clarify the point that although adulthood stands alone as a discrete, self-contained and separate stage of life, there are other forms of learning that people engage with in their childhood and adolescence that may influence their attitude and participation towards adult and continuing education. Lifelong Learning is a more holistic approach covering different stages of the learners' whole life whereas HKFTU today tended to centre mainly on adult education. It is not fair to say that HKFTU ignored education in early ages, as they had been involved in organising primary and secondary schools before the implementation of the nine-year, primary one to secondary three, compulsory education policy. Their involvement was largely phased down after the adoption of the policy. Yet earlier chapters indicated that the present schooling system might not be fair to the workers and HKFTU should review their degree of involvement in the childhood and adolescence education.

The HKFTU should strive for developing a more pluralistic and accessible opportunities for education throughout lifetime and to remove barriers that retard access to education and the more widespread involvement of learners in the design and management of their educational processes: that is democratization. If a society can implement the recommendations, that will result in creation of a learning society.

8.6 Concluding Statements

Although it is the moral obligation for HKFTU to take care of the welfare of the increasing numbers of its members, it is inconceivable how the problem of unemployment, without a long-term strategy, could be solved by knee jerk political actions. In order to cope with such challenges, Hong Kong has to upgrade, on a large scale, the knowledge of the present workers. Globalisation of the economy, increasingly rapid technological change and the transformation of labour markets have made education and training central instruments of social and economic policymaking.

The thesis has shown that HKFTU was involved actively in the past and is also taking an increasingly active interest in the education and skills level of their members. With more and more involvement of HKFTU in workers' education, the trend could facilitate a move away from an individual and towards a collective approach to workers' education. HKFTU, with its influence may serve as the change agent for the workers to upgrade their ability to cope with the challenges from the market.

For HKFTU, Lifelong learning and pre-work education are seen to be the key to the development of an inclusive and just society whose economy is successfully competitive in the global market place. HKFTU leaders argued that investment in knowledge and skills would provide the essential foundation of both individual employability and the competitiveness of an economy based on high value-added goods and services that are tradable in the global market place. In addition, they also expressed, one way or the other, that labour market flexibility will ensure that the Hong Kong economy can create jobs on a sufficient scale to tackle social exclusion. The future educational role of HKFTU would still be on enhancing employability and social mobility of individual members, but in the longer future, HKFTU should explore more on prompting the role of education as a tool for enlightenment for its members.

(47,797 words, excluding references and appendices)

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Appendix I

Questionnaire used in survey of adult learners (modified from Chan and Holford, 1991)

Note: This survey was conducted in Chinese through telephone interviews during October 2001.

1. Personal Information (Part A)

1. Age (people under 15 are excluded from the survey)
2. Sex
3. Marital Status (single/married/separated/widow(er))

II. Training Experience

(Courses excluding full-time school curriculum)

1. Have you attended (or are you now attending) any educational or training course during the past 12 months? (Y/N)
2. If Yes,
 - (a) How many courses
For the most recent course:
 - (b) What was the subject?
 - (c) What was its duration?
 - (d) What was the total number of contact hours?
 - (e) What type of course was it? (e.g. short/certificate/degree/professional membership)
 - (f) What modes of teaching were employed:
lecture
workshop

self-study package

correspondence

audio-visual material

computer assisted learning

(g) Was the course conducted within or after office hours?

(h) Which institution organized the course?

(i) What was the fee?

(j) Were you sponsored by your company?

If yes, in what form: fee, day-off, etc.

(k) What was the language of instruction?

(l) What is your evaluation of the course? Was it

(Excellent, Good, Fair, Poor, Very Bad)?

3. If answer to II.1 is "No",

(a) When was the last course you attended held?

(Number of years ago or never attended)

If not "Never attended":

(b) What was the subject?

(c) Which institution organized the course?

(d) What is your evaluation of the course? Was it

(Excellent, Good, Fair, Poor, Very bad)?

III. Motivation for Attending Courses

(Not applicable to respondents whose answer is "No" to II.1 and "Never attended" to II.3a)

1. What was the purpose of your attending the most recent course? (If answer is to learn the subject concerned, followed up by asking why the respondent wished to learn that subject).

2. Prompt whether the following are major reasons for attending the most recent course. (Yes/To a certain extent/No)

- (a) to improve your job skills
- (b) to improve your prospects for promotion
- (c) to increase your salary
- (d) to transfer to another field
- (e) to obtain a qualification
- (f) for self-development
- (g) for interest
- (h) because of encouragement by other people
- (i) other reasons. Please specify.....

IV. Deterrents

Ask all respondents whether the following are major hindering them from taking any, or more course. (Yes/To a certain extent/No)

- (a) to take care of my family
- (b) not enough time
- (c) not enough money
- (d) course fees are too expensive
- (e) courses are not useful
- (f) I am too old for further study
- (g) my education level is too low for further study
- (h) no appropriate courses are available
- (i) I have too little information about relevant courses
- (j) meeting places are not convenience
- (k) meeting times are not convenience

- (l) no interest in further study
- (m) too busy for other activity
- (n) I have no confidence in my studying ability
- (o) I get no encouragement from other people
- (p) I prefer self-learning
- (q) others, Please specify.....

VII. Personal Information (Part B)

1. What is your occupation?

Are you in Full-time o Part-time employment?

2. What is your educational level?

(Below

Secondary/Secondary/Matriculation/Post-Sec./University/Post-graduate)

3. What is your monthly income (< 10,000; 10,000-20,000; > 20,000)

4. How many children do you have (Ask only if not single)

5. In what area do you live (HK/Kowloon/New Territories)

6. In what area do you work (HK/Kowloon/New Territories)

1. **Appendix II**
2. **Interview Records (comments from the interviewer was written in italics)**
3. Interview with Ms. CHAN Yuen-han, Vice-chairman, the Hong Kong Federation of Trade Unions; Legislative Council Member; Chairperson of the Education Advancement Society for Workers in Hong Kong and Kowloon
4. *What are the purposes of your educational services?*
5. According to Chan, the ultimate aims of any service that the FTU provides are to help workers and to uphold their rights in the society. On the matter of educational services, the FTU acts to develop working skills among workers and to nurture self-improvement and self-renewal by providing workers opportunities to gain experience in different industries.
6. *What are the strengths of your educational services?*
7. Chan saw the most important strength in FTU educational services to be its efficient responsiveness to concurrent market needs and workers' demands. For example, with the rise of the logistics industry in Hong Kong, the FTU have provided courses for truck drivers to teach them how to pass through immigrations. The FTU is also particularly sensitive to the needs of workers: for example, many courses in the FTU operate in the nighttime to allow an opportunity for workers to receive training in addition to having their own careers.
8. According to Ms Chan, it seems HKFTU's education service is driven by two forces, one being the market needs and the other being workers' needs. In this sense, HKFTU's education service's orientation is more on the responsive side to the two forces, and lacks a mid- to long-term direction. As will be illustrated, most of the interviewees reflected similar view in worker's education, i.e. unclear future direction of education and training for workers.
9. *What are the weaknesses of your educational services?*
10. According to Chan, the main weakness in FTU educational services is the lack of resources to make courses truly beneficial to workers. Course fees merely

contributes to a small portion of the total operation cost, and much of the money that the FTU receives for its educational services is from charities and government funds, both of which are often limited in their support for the FTU.

11. Another important weakness is the lack of a mechanism that allows workers to gain recognized qualifications in the form of a certificate or diploma after they complete a course organized by the FTU.
12. Effective transition from education to work is also hindered by the lack of jobs in certain sectors. Thus, workers often find it difficult to use their newly developed skills in the labor market.
13. Lack of financial resources is a major weakness of HKFTU's education service. This is a dilemma to the HKFTU that course fee must not be expensive for workers while course cost is high. As also reflected by Mr. Leung, cost fee only covers a small portion of the cost. The HKFTU has not had a solution to this continuing problem.
14. Ms. Chan pointed out a very important factor in workers' education which is qualification recognition. A comprehensive qualification recognition system similar to the National Vocational Qualification of the Britain is very much needed in Hong Kong. Although there is not yet a comprehensive qualification recognition system in Hong Kong, Ms. Chan reflected this factor as an internal weakness implies that HKFTU is weak in organizing recognized qualification attaining courses. Hence, even when there is a comprehensive qualification recognition system, HKFTU's education service might have difficulties matching the system.
15. **Any political, economical or sociological changes that are affecting your educational services?**
16. Chan stresses repeatedly the importance of vocational training services to adapt to the constantly changing trends in the labor market through time. According to Chan, the FTU has acted in sync with concurrent market development. For example, during the rise of the retail industries in the 1970s, the FTU immediately began to offer courses on Japanese for workers seeking work in big Japanese retail chains, which have just begun expanding their roots in Hong Kong. Today, the FTU has also made adaptations in their educational services in the rise of logistics industries and tourism by providing the appropriate courses suited to these industries.

17. *What are the opportunities of your educational services?*

18. The main way in which the FTU provides education is through courses that are offered to the workers. The aim of the courses is to discover each worker's potential through training and thus allow more job opportunities to be open for them. The content of the courses entail essential skills for office jobs, such as Chinese and accounting. On the other hand, Chan also stressed the important role that the FTU plays in creating more opportunities for workers by offering courses that teach various entrepreneurial skills, in order for them to start their own businesses.
19. Despite the FTU's efforts, however, opportunities are limited because of the lack of recognition in the society for these vocational qualifications. Chan strongly emphasized the need for the government to take action by creating a mechanism that allows these qualifications to be recognized.
20. There are lots of space for advocacy. Whether lack of recognition in the society is a cause or result of lacking qualification recognition is not known. HKFTU, however, has a role to fight for workers' right and to advocate a positive image of workers' education as a service provider.

21. *What is your future plans for the educational services?*

22. According to Chan, the FTU will continue to provide educational services that are suited to the concurrent needs of the labor market. In addition to this, the FTU will continue to assert pressure for the government to provide academic recognitions for their courses.

23. *Ms. Chan showed her focus in advocating for qualification recognition and continuing service provisions.*

24. On the inherent problems of vocational training in Hong Kong

25. Chan was very critical of the lack of effort the government is putting in on developing a sound vocational training system in Hong Kong. It still holds a rather degrading attitude towards vocational education, regarding it inferior to formal academic education. The lack of recognition the government has given to vocational training courses is a sign of this ignorant attitude that she possesses towards vocational education. The government's program *Yi Gin*, to provide so called 'innovative' education for the younger generation who have failed in their

- formal education, is at best a feeble attempt to counter the problem of unemployment and juvenile delinquency.
26. Secondly, Chan feels that there are inherent problems in the current system that prevents fair and effective education for all. The Vocational Training Council, according to Chan, is doing a lousy job in managing their finances, and has made little effort in accommodating teenagers with an educational level below F. 3. Chan made specific criticisms against the current head of the VTC, saying that he is very 'inflexible' in his approach towards changing for the better.
27. Ms. Chan is very dissatisfied with the work of the government and the Vocational Training Council, which are the bureaucratic structures. She has complains over the system and structure, the leadership and the attitudes. It showed her characteristics of a leader in trade union and as an advocate.
28. *On the top 5 obstacles that are impairing the FTU to offer a better workers' education (in order of importance)*
29. Firstly, Chan feels that it was vital for the government to change their attitude towards vocational education as being inferior to formal education. According to Chan, the government must give recognition to qualified training courses, and take the initiative to create more job opportunities for workers who have received the appropriate training, in order for them to put their skills into practice.
30. Secondly, Chan cites the structural problems of the existing vocational education system as being a major obstacle for the FTU to offer a better workers' education. Ideally, the relationship between external vocational training courses, vocational schools, and mainstream schools should be dynamic and interwoven, so that, for example, an individual can choose to transfer from a vocational school to a mainstream school, or to take qualifications received from an apprenticeship and enter into a government-funded vocational school. Such flexibility in the system would allow the individual to find the type of education best suited to his or her own needs.
31. A third obstacle lies in the operations of vocational education provided by the FTU. There is a severe lack of funding and thus a constant problem of resource allocation. The FTU is also forced to work with the existing (flawed) vocational education system.
32. A forth problem, according to Chan, lies in the lack of publicity of the value of vocational education. For example, it is important for parents to know the

opportunities and prospects that are offered in the vocational education, but little information is given at school or by the media in general.

33. A final problem lies in the attitudes of workers, employers, and parents towards vocational education. A more open and flexible ideal of education must be instilled in order for the society to come into terms with the true value of vocational education.
34. The first and second obstacles came from the government and the statutory body as claimed by Ms. Chan. She claimed that the government has to give recognition to courses and create job opportunities. Moreover, the system should be interwoven. For such change to happen, a key player who can work within the bureaucratic structure might be critical. In fact, Ms. Chan herself is a member of the Legislative Council(LegCo) and the HKFTU also has representatives in the LegCo, it is already easier for them to advocate for the change. Nevertheless, change does not seem to be coming and the reasons have yet to be studied.
35. *The problem of funding limited the work of HKFTU's education service. Not only operation of courses, but also the forth and the fifth obstacles, are limited by financial resources. Publicity and public education could be organized or promoted by service providers instead of the government. However, the effects and results would be facilitated and more positive with the government's support. Lacking financial resources restrict the HKFTU from working in these areas and the whole matters have to rely on the government who seems to have no initiatives.*

36. Interview with Mr LEUNG Kai-lik, Director of HKFTU Spare-time Study Centre
37. Mr. Leung provided a very detail account of HKFTU's education service. It was informative and thought provoking.
38. *What are the purposes of your educational services?*
39. Mr Leung said FTU's educational services originated in 1946 with the purposes to help workers' children to learn and receive education. After the (Cold) war, there were so many children who did not have school to attend. Moreover, the government did not concern about education and contributed limited resources in it at that time. The union then organized some elementary classes such as learning writing, but system could not be formed. The government later provided school places to operate at night. With the support from churches, the union had applied a land to build a school. The demand was so big that the union had to have meetings to allocate the spaces. This was the mainstream education in which the union aimed at providing education and learning opportunities to workers' children. The union also operated night school, which was also following the mainstream education, for adults too.
40. *Normal school education was more micro which is one of the duties of the union to Mr Leung. The union has its own duties which include education in more macro scale like general knowledge of workers and knowledge at working positions. These learning were not attended by the government. Although there were vocational training and education, they tended to train technical workers professional skills. In fact, some employers did provide training such as on the job training and apprenticeship. However, these opportunities fluctuates when there were enough manpower in the marker that the employer would not need to provide training. Moreover, apprenticeship required prolonged period of training and depended on the mentor. As such, union played a very important role in assisting the workers to find jobs and provided training to them on different aspects related to finding a job including where and how to look for jobs, and basic skill training to enter the industry.*
41. The union organizes courses to provide opportunities for workers who have motivations to learn, but have no access to or discouraged by regular education system.
42. *Mr. Leung claimed HKFTU's education service covers both general knowledge*

as well as knowledge in working position. This is, in fact, workers' education and supplement the inadequacy of mainstream grammar school education system. It evolves from apprenticeship which was ineffective and insecure for workers in the past. The purpose of education service is to provide training to workers on different aspects related to work.

43. *What do you think the educational needs of the workers are?*

44. The educational needs of workers included basic education before finding a job, work related knowledge, and skill training. When there were periods which employers did not organize training to workers due to adequate manpower in the market, the union played an important role in workers education and training. The workers also need to have opportunities to learn more of different industries in terms of skills and work related knowledge.

45. *Here Mr. Leung was talking about transferable knowledge and skills at work. Moreover, the role of HKFTU is particular important in situation of high unemployment where workers cannot obtain training from employer, but would need more knowledge and skills to find other jobs.*

46. *What are the strengths of your educational services?*

47. The union had members from different disciplines, different industries, and different rank of workers. The union is like a mutual helping community that when skillful workers are spotted, the members just get the necessary equipment and start teaching those lower rank workers. The union also had a variety of interest courses provided to members, and the time and duration of all the courses are not as demanding as the normal night schools. Moreover, the fees charged are short term based which required less from the workers. The service is flexible that the courses are organized according to workers' needs and demands, and the union mobilizes members to teach. Course fee is low as a result of this.

48. The union is also flexible in organizing courses according to workers' demand. Since the one who teach is volunteer, timing is even more flexible according to workers' needs. There were classes for restaurant workers before 8:00am and after 11:00pm because these workers have long working hours. The service provides the very basic learning opportunities, which is not allowed in normal school, for adults and workers who do not have the opportunities. The service

promotes their motivation to learn. By providing the opportunities, no screening or discriminating, low course fee and flexible time slot, it is easy for workers to take the first step. With the union's support, their motivations to learn further are increased and promoted.

49. *The HKFTU adopt an open-door policy in its education service. There is no screening of participants and the courses are flexible to the needs of the workers. There were tailor-make courses to workers with special needs. Mr. Leung had stressed the importance of providing opportunities for workers and to promote motivation to learn. This is a major characteristic of HKFTU's service. This principle is very similar to "education for all" and is a very distinct strength of the service.*

50. *What are the weaknesses of your educational services?*

51. The union, when its works are heavy or there are labour-employer conflicts, the class and activities cannot be conducted. Moreover, the union has limited resources to hire manpower to be the organizer of different courses. As a result, the service could not be implemented systematically.

52. *Limited resource is the major weakness of HKFTU's education service which limits its operation.*

53. *What are the opportunities of your educational services?*

54. In 1981, there were about just more than forty courses organized. Now the service organizes more than four thousand courses of different disciplines. We liaise with mainland university to organize programmes that are not offered in Hong Kong.

55. The views of continuing education change. Even the education sector has changing views about education of different aspects and disciplines. As a result, the Hong Kong Polytechnic University and the Caritas Adult and Higher Education Service view that our service has similar elements with theirs. The union's service would link up with their higher level learning. FTU's service is perceived as having some effects in workers' learning and the attraction for them to go for higher education increases after the link up.

56. *Different from Ms. Chan who focused more on internal perspective (offering*

course by themselves), Mr. Leung reported cooperation with external service providers as the opportunities of HKFTU's service. However, the potential link up with higher education institutions was not really initiated by the education service of HKFTU, it was caused by a changing view of continuing education. This also reflects its passive role in workers' education and in development.

57. *Mr. Leung did not really speak of the threats to the service. This might reflect that Mr. Leung lacks a sense of risk or he is satisfied with the service.*

58. *Any political movements that are affecting your educational services?*

59. The requirement to register, if not amended, would quite restrict the growth and development. The rationale of the officials who manage education needed a very big change. Although there have been changes observed in the government, whether the change has move to a very complete conceptualization has not been seen. Whether the union's service is education according to the government has not yet been settled. If the service is education to them, then it is put into mainstream and monitored under the traditional approach. Now it is life long, adult learning. The government is still discussing how the direction is going.

60. *The service has been troubled by such requirement for a long time. It reflects the government, in the area of adult education and workers' education, still has not developed a more complete conceptualization.*

61. *Any economical changes that are affecting your educational services?*

62. The poor economic environment affects participants' learning motivation and participation. They tend to be lower when the economy is poor. Moreover, although the course fee is low, we still have to charge participants and it creates some difficulties for us in implementing courses.

63. *Any sociological changes (e.g. attitudes of the students, cultural behaviour etc) that are affecting your educational services?*

64. The constitution of participants has changed. There are not as many illiterate as in the 40s and 50s. However, the knowledge requirements by the society change and hence the demand for learning is very large. The participants are not just low to middle level workers. Majority of participants, about 60% to

70%, have received secondary education or above. About 20% of the participants are university graduates. The society has changed that secondary school qualifications in the old days are good enough but even university graduates are not enough nowadays.

65. *Such change is caused by the nine-year free compulsory education policy. Mr. Leung, while aware of the change, did not reflect other sociological changes such as new arrivals from the mainland or*

66. *Any technological changes that are affecting your educational services?*

67. The union has to organize courses according to its abilities. When we do not have the facilities or equipment, we liaise with other professional organizations and mainland universities to organize the courses. If the union cannot arrange the courses, we do not organize them.

68. *Restricted by resources, the HKFTU could only organize courses according to their abilities. However, HKFTU's service seemed not proactive enough to explore potential resources such as fund bidding and opportunities such as cooperation or strategic alliance. This is a major weakness of the HKFTU's service that the service aims to meet workers' needs and demands but when they are incapable of meeting them, they give up.*

69. *How do you recruit instructors for the programmes?*

70. For teacher, it would be nice to have professionals, strong and knowledgeable persons to participate, but in fact there is no need as long as there is such organization, such service opportunity for those wholehearted people to develop themselves. As long as they are kind hearted, they would help. We welcome professionals to help but not if they do not have the heart.

71. *The service relies mostly on HKFTU's member to teach. Generally, they do not have training in teaching but they usually are working in the field which they teach and are experienced. To Mr. Leung, qualification is not as important as dedication. This is a good tradition but when the qualification system is established, it might become a potential hinderance.*

72. *How are your training facilities? Are they sufficient? Do you think the*

training facilities and aids of the training centres adequate in their support of course content and method? Is your equipment equivalent to the present practice of the market? Do you have sufficient space to hold the training exercises?

73. The union tried to make use of all its resources. To certain extent, we are better than some of the commercial schools outside. The union try their best to keep participants involve, and promote their learning motivation as far as they can, such as installing air conditioning. What we provide, in general, are not very specialized. We assess our ability and we are not aiming at very professional training. The union's service is more like general education. We either do not organize the training if we are not capable or we utilize other's resources, such as science laboratories. The union cannot compare with the universities. However, if it is compared with the commercial schools, we are not bad. The union has the places of its own and venue is not a big problem. With clear focus and direction, the union shares the venues and facilities for courses, activities, and meetings.
74. *HKFTU's strategies are actually practical under the environment (limited resources) they are in. With a clear direction that they are not directing professional training, they are more capable to meet the demand for facilities.*
75. *What are the major types of training programmes that your institution offers?*
76. We provide learning in areas like general knowledge and skills required in participants' working position. We provide training to workers on how to find and get a job of different disciplines. There are courses focusing on skills training, but also courses on personal interest and hobbies, and culture. We even have qualification acquiring programmes but we liaise with other professional associations and mainland universities for these.
77. *The service now provides diversified courses for various purpose such as vocational oriented, general knowledge, interests and hobbies, etc. This wide coverage does match with the concept of holistic learning and could be advantageous in future development.*
78. *Do you have adequate methods to evaluate your students?*

79. It is participants' choice to come to learn. We do not really have examinations. We aim at protecting their enthusiasm and motivation to learn.
80. We look at their attendance but it can hardly be a good indicator because participants have to work and that's the reason for them to choose short courses. We will arrange survey in the middle of the courses and also at the end of the courses. The survey also provided information whether the course help them in work.
81. *This is an open-exit policy parallel to the open-door policy for entry. It is not a poor policy for the service is directed towards providing learning opportunities and promote learning motivation. However, it has to be carefully reviewed if the service is going to link up with other institutions and matching with the qualification system.*
82. ***How do you match your training programmes with the requirements of the market?***
83. Following social development, economic development, and knowledge development, we provide different types of learning. These certainly include skills, interest, hobby and culture.
84. *In line with Ms Chan, the service responds to the changes in the market and society.*
85. ***Are there any quality assurance procedures to maintain the quality level of the programmes?***
86. We will arrange survey in the middle of the courses and also at the end of the courses.
87. ***Would you list down 5 major obstacles that are impairing your institution to offer a better workers education? Please list down the above factors in the order of priority (From most important to least important) Can you provide suggestions to solve the top one (most important) obstacle?***
88. The government is one of the major obstacles. The problems are from the policy on education. The union is not a school and we cannot register as school.

In fact, the union must not registered. However, the government required the union to apply for exemption to register as school. Even we are exempted from registration as school, the union and the educational services are still under the monitor of school policy. There are so many limitations under the school policy such as no course on Saturday and Sunday, and no night course after 9:30pm. Adults are the targets of the service and they do not need school policy to protect them. The union is working for the benefits of the workers but is restricted by the policy. Whether to fight for the right with the government, the direction of the union and service provision are affected. The government applies traditional school policies to restrict the service. The union has been troubled by these restrictions and will continue to be troubled if they are not amended.

89. The economic environment is also a problem but the union has never viewed it as that big a problem. When the economic condition is bad, it certainly has some effect on participation. Although the course fee is already low, we still need to charge the participants. Some participants used to study 10 courses, they are obliged to study in fewer courses. Learning motivation is affected by the economic condition
90. The rationales of the education sector and the officials are also a factor affecting the service. Some of the officials had clear views that the union's service does not like school and the education provided by schools. Even the union organizes English courses, the courses are not taught according to the syllabus. Different government officials at different stages have different views. Some of them view the English courses and the LCC offered are under their monitor and regulation.
91. The union's internal issues such as whether direction is clear, manpower, and motivation, is a factor. If direction is clear, resources will be invested to serve workers. The union is clear about its direction. The union also has good mechanism that the union has never hired a tutor.
92. *To Mr. Leung, government policy is a major obstacle affecting HKFTU's service. Mr. Leung considered the service not education, but a service providing opportunities for workers' to learn which does not have too many restrictions. It is a platform to promote learning motivation and enrich participants' quality of life. It should not be viewed as a school and be governed by the school and education ordinances. This is a big hindrance to the operation of the service as they have to negotiate with the government occasionally.*

93. Interview with Mr CHAN Cheuk-hay, Principal of Hong Kong College of Technology

94. *What are the purposes of your educational services?*

95. I did not look at the details and history of HKFTU but my impression is that HKFTU's service and our service have some difference. Some kind of division of work. HKFTU basically serve members and provide courses that they can arrange according to members' needs. One of these needs include work, career, while another on workers' general and cultural life enrichment. Education is one of the methods for the union to provide service for its members. HKFTU, also through this method, to maintain its relationship with members and also to expand its membership network. Therefore, the education service has certain effects to the development and establishment of the union.

96. Hong Kong College of Technology (HKCT) was workers' night school and it was established by Education Advancement Society for Workers in H.K. and Kowloon(EASW). In terms of time, EASW was established even earlier than HKFTU. To a certain extent, EASW crystallized the power for union and actually eased the formation of HKFTU. In providing education for workers and labors, and the crystalization of energy for union and labour movement, we do not have any difference. In fact, they compliment each other at early time. As it develop, EASW is getting more specialized because the objective of establishing EASW is, basically, providing education. It is different from the objective of establishing HKFTU which is to serve comprehensively members' rights. Our functions and responsibility are different. We are more focused on providing education.

97. Unlike HKFTU, we do not have other business. In recent years, we have developed some external service. We developed some centers to provide service to external parties but our objective basically is still providing education. Our main body of service are still providing education. Our efforts have all put into providing education. We cannot say we are more specialized or professional, but we devoted totally in providing education.

98. *Although the origin of HKCT was "Workers Night School" and had close relationship with HKFTU, Mr. Chan talked only very few about HKFTU's service. He viewed HKFTU's service as a mean to maintain relationship with members and to expand the network and did not mentioned anything about providing learning opportunities to the workers or empowering workers. Mr. Chan*

provided an outsider's view of HKFTU's education service including to strengthen membership drive and to serve members. Mr.Chan provided little ideological account on workers' education

99. *What do you think the educational needs of the workers are?*

100. Before we have wholeday programme, most of HKCT's targets are working individuals. There were some overlaps with trade union but there are some differences. Because our service targets are not only trade union's members, and we have some courses which are more advance. In terms of students' background, the students would exceed trade union's students' background. Therefore, HKCT, for 55 years, watched what the needs are for education, as we identify ourselves in the early stage as workers' welfare service. We looked at what workers' needs to organize courses. However, as the economy change and the popularization of education, and the difference between working class and white collars are getting more blurred, HKCT's targets are moving upward. From originally targeting at technical workers, working class, the target are now more on professionals, and the level of programmes offered are up to Master level. This is the overall trend. But as the economy change, we re-adjusted our targets again to ordinary workers/working class in the early 90's (moving downward), such as those who have junior secondary level education, low education qualification and older targets groups. Now for adult working class, our coverage is quite wide that we offered programmes from junior secondary level education to master level education. Also we see that in recent years there are some problems in secondary education, according to our study in organization of professional further education, alternative ways of learning should also be provided to those secondary school graduates. As a result, from 1996, we organized some whole day diploma courses to take in these secondary school graduates so that, apart from grammar school Advance Level study or normal university studies, they can continue study. Since offered, we see that it matches with the community's needs and its development is quite substantial that from only tens of students at the very beginning to now more than 700 students in the wholeday programmes. At this foundation, as the government policy put more concern on education since 1997, in 2001 we launched the government recognized tertiary level programmes. We can say that now HKCT is an institute which has part-time, as well as wholeday programmes; supplementary education as well as tertiary education. Our direction is to have focused development on tertiary education to mobilize other courses and programmes to

improve and further develop. As a long term goal, we wish to have the opportunity to develop into a private self-financing university.

101. Mr. Chan had some mis-understanding of the service of HKFTU that the service targets in fact are not only trade union's members. From workers' night school, an upward movement of the institution had been observed. However, the direction of HKCT is worth examining. On one hand, Mr. Chan said government funded Employees Retraining programmes make up about 40% of all HKCT's programmes, and these participants might be previously workers who are now unemployed. On the other hand, the direction towards tertiary education and self-financing university is not directed for workers. The two requires clear vision and mission to achieve coordination.

102. What are the strengths of your educational services? What are the weaknesses of your educational services?

103. One weakness is that we have very limited resources. Financially, we rely solely on tuition fees to support our development. Especially for tertiary education development, it would be an extremely difficult process. We all know that developing tertiary education is an expensive item. We are doing something which is probably impossible to succeed. Lack of resources is one of our major weaknesses. Secondly, manpower is another weakness. Historically, HKCT has been focused on adult education. As a result, our academic strength is not enough in terms of full-time academic staffs. We have been recruiting part time manpower to help. So if we need to focus on tertiary education, we need a big change in manpower. Whether we can recruit enough manpower, integrate our manpower internally, and whether our management level and ability, in terms of talent and manpower, can match with the change are big challenges to us.

104. Thirdly, the market environment created another weakness.. The government, since 1997, has stressed on market competition and ceased subsidy. However, in market entry, as there are very strong and large publicly operating systems in the market, they pose very big threats on those newborn privately run institutions trying to enter in the market and operate to survive. In addition, the government in her different policies still has not considered the issue of entry and survival and it makes those already benefiting market sharers to utilize their advantages to acquire larger share of the market under present constitutions. Therefore, such market environment is another big weakness to us.

105. One of our strengths is that, as we are in such environment, we have strong vitality. Before 1997, we could still survive and develop under political pressure and discrimination policies. After 1997, the government has shifted to use a market competition for elimination and we can still develop. We see that we have very strong vitality. We are very different from those organizations which rely on subsidies for their operation and survival. Vitality is a simple adjective but underlying this is our whole set of methods to adjust to the market. Our operations have maintained at relatively low cost, and our development strategy are rather moderate, steady and safe. Our vitality is very much related to these underlying methods. We have a set of efficient methods to fight for society's resources to make up our deficiency in financial resources and manpower, and this is probably our biggest strength. Since 1997 the discrimination on us decreases, this strengths can be utilized and developed even further.
106. Familiarity to the public is also another strength, especially on adult education and holistic education because we have longer history, and we have established some reputation in the past. Therefore, though we do not have as strong the brand name as the public institutions, we started to becoming a brand name. This brand name has advantages over those new comers to the market.
107. Due to our background, we already have certain networks and these networks assist in borrowing and asking for external resources such as manpower, and opinions. We can also find others through our network to give suggestions, opinions, plans and strategies.
108. *Limited resources is also a problem to HKCT, especially for developing into tertiary institution. However, Mr. Chan considered ability to operate under deprived resources to be their strength. Manpower is another internal weakness as HKCT, similar to HKFTU, is obliged to recruit part time human resources for teaching. However, market environment is an external factor and Mr. Chan was talking about the competition in the tertiary education segment. It seems that Mr. Chan is pro-market competition and he does want to involve in the market. To Mr. Chan, ability to survive in competition is one of HKCT's strengths.*
109. *Familiarity to public fades if marketing and publicity are not performed especially in the competitive environment as Mr. Chan described. As the reputations of those continuing education divisions of the public institutions spread, the reputation of HKCT would be ranked behind those institutions and familiarity would not be a strength.*

110. What are the opportunities of your educational services? What are the threats of your educational services?

111. Both opportunities and threats come from marketization. We do not have common ground or starting point under marketization. For those existing large market sharers, if they utilize their advantages and strengths to occupy the market, they can certainly do that. It is just whether they have the management ability and ability strategically, but not economically, to expand and occupy the market. As I said it is exactly our vitality that survive us under such competition. We have been and used to working under tough condition and we know how to look for survival space. That is even with scarce resources, we can utilize to survive. In contrast, some existing organizations receiving subsidies do not know how to survive or develop under limited resources. This beomes our opportunity. Those institutions are inactive and so used to (嬌生慣養) their conditions that they have the opportunity to occupy the market but they don't know how to seize 把握 and utilize the opportunity. As a result, we have the opportunity, but also this is a potential threat to us. At last it comes to the level of strategic planning under such competitive market and how you position yourself and your development strategy. These are crucial factors to the survival. Of course government policies are very important here that, if the policies change to lean towards and for the new comers in the market, then our opportunity is bigger. On the contrary, if the government thinks that these new comers are not valuable and troublesome, and leans towards the existing institutions, our space to survive diminishes. Government policy is a decisive factor in the education market and education is not a free market.

112. Mr. Chan emphasized again competition in the market as the threat as well as opportunity. However, he appeared confident on the ability to operate in competitions as he spoke of the inactive insittutions and the new comers more like an observer. To Mr. Chan, HKCT was capable and had the strategies to seize opportunities in the market though he did not explain about the strategies. Government policy was mentioned as a potential but Mr. Chan considered it was not opportunity or threat at the time of interview.

113. Any economical changes that are affecting your educational services?

114. Economy is also both threat and opportunity. As people's economic ability

worsen, for us who rely totally on tuition fee for survival, the reduction in source is a threat to us. However, the public also sees that if we are not competitive, we cannot survive. Therefore, they are willing to mobilize their resources to take part in our training and education. Now it depends on how long the economic recession would last. Our worry is more on when it worsen to the situation that people can hardly find resources to get education, the whole education and labour market will be very sad. It is sad that not only the education institutions cannot survive, but also the general public will fall into a vicious cycle that polarization will become serious. Those who are poor cannot afford to receive education and will be marginalized more and more. This is a crisis to the whole society. However, the phenomenon is not very obvious now but we worry that it would happen.

115. Mr. Chan paired downturn of people's economic status caused by recession with reduction in tuition fee. However, the relationship is not as obvious.

116. Any sociological changes (e.g. attitudes of the students, cultural behaviour etc) that are affecting your educational services?

117. The phenomenon now is not very healthy that interference on further education from the government is getting larger and larger. I have written an article on Market Economy in Continuing Education saying that continuing education should have the highest degree of freedom in the whole education market, because it does not have government subsidy. The threat from free market comes not from the government but from monopolization. However, the threat now partially comes from the government's different fundings (continuing education fund, and funding from Employee Retraining Board). The government invests money but the flow of these money are decided by some committees and these committees decided what industries receive the assistance. This is a planned economy. The government believes those industries which should have development and the public should study following these directions. Then she subsidizes further study in those areas and this is not healthy development.

118. What Mr. Chan said was more a political and economical factor instead of sociocultural factor. Mr. Chan seemed to be preoccupied with market share and competition.

119. Any technological changes that are affecting your educational services?

120. Technological changes mostly influence on the content in education service. Basically, the impact on format is not that crucial. Due to Hong Kong's geographical factors, local students do not like distance, correspondence and self learning because they go to school very easily. Therefore technology in shortening the distance is not as applicable as in foreign countries. In fact, a person seeking further education requires that person to have strong self control ability, and this is not very workable under such environment in Hong Kong.

121. There are some influences on the format of education but not a revolutionary impact. It allows students to be able to receive more support. Technology's impact on education has a supplementary effect but not replacing effect. In the whole world, there are very few really successful on-line education. Because there are so many human factors involved in education, relying on machine cannot achieve the objective, and the cost is very expensive too. A totally interactive, custom designed programme is very expensive, and the time needed is very long. It does not match with the characteristics of education. Technology, as of today, cannot support and has not reached to the point that can make the format of education to have a revolutionary change. It is not advance enough and not common enough. The cost is too expensive and time is too long.

122. What is your future plan for your educational services?

123. Tertiary education is our direction. If our ability can afford, we wish our wholeday programmes can reach the scale of 2000+ students, and we wish to have wholeday bachelor programmes which are jointly organized with foreign institutions. This is what we meant by tertiary institution. We will become a wholeday tertiary institution with scale. We will have wholeday bachelor programme in the institution but within our ward, we will have associate degree programmes.

124. Tertiary education might not be the market demand especially wholeday tertiary institution. From the perspective of workers education, the direction of HKCT is moving away from workers.

125. What kind of manpower is needed in the market? What level of job (managerial, supervisory, clerical or unskilled levels) has the highest vacancy?

126. In fact, I do not have much examination on this issue. We follow recent trend to work. The study of manpower is not what a single institution can achieve. It should be done with the whole Hong Kong's resources. In fact I would like to see someone who can study and provide reliable forecast, plan and comparison. There would be a lot of variables inside but it would be better if we have a more macro view. I have no answer when you ask what could help Hong Kong's economy and development. However, if you ask what must be done and if not being addressed would become a crisis, I would say the people with low education attainment and low skill level. As I said, these people will be further marginalized as the economy continue to decline. Even if the economy is not declining, these people are already marginalized. How you can increase the competitiveness of these people through education so that they do not become burden of the society is very important. If not, they are trapped and marginalized further. Not only the government expenses will increase but also blaming and anguish feelings would be accumulated in this group of people.

127. Mr. Chan, as a principal of an institution aiming at tertiary education, did not understand well the market need for human resources. Although the manpower need was not clear, Mr. Chan identified and empathized with the people with low education attainment and low skill level. These people actually form a considerable population and they are very much in need. HKCT would be a potential assistance to these people but they are no longer their target.

128. How do you recruit instructors for the programmes? Do you think the level of the courses is appropriate to your staff's abilities? Do the instructors have previous training on how to teach?

129. The recruitment methods are no different from other institutions. Through advertisement to recruit. We list out the qualification and other requirements according to the course requirements. After recruitment, we have a set of management method so that our quality can be maintained.

130. For part-time teacher they basically do not have the training in teaching. Since our part-time programmes are more specialized and when we recruit instructors, we focused on whether they have enough professional knowledge and their professional qualifications. Therefore, in general they do not have training on education theory and methods. But we rely on our management staffs to assist them in instructing, and we have those staff development seminar and workshops and we encourage them to participate. However, we cannot force them. Most

of the teaching staffs are part-time, but we have those wholeday programmes and so we have some full-time teachers. The ratio difference, however, is large. About 90% of our full-time staffs are executive, administrative and ordinary staffs, simply they are non-teaching staffs.

131. The recruitment methods were more formalized.

132. How are your training facilities? Are they sufficient? Do you think the training facilities and aids of the training centres adequate in their support of course content and method?

133. Among the self-finance institutions and other than universities, we are actually pretty good because we believe that to have good result in education, there must be certain facilities. I can say that, except from the school building/structure, our facilities in school are good among the self-finance institutions. When we consider organizing courses, we think about whether we have the conditions to do. We look at our resources first, and decide whether we organize the courses/programmes. If our resources cannot support, we do not organize them.

134. The principle of course organization was similar to HKFTU's that they both would not organize if resources were lacking. Again, this is not a proactive strategy in which when a market demand appears, they react and if they do not have the resources, they fall behind in market competition.

135. Is your equipment equivalent to the present practice of the market?

136. We are forced to follow the market requirement. If we do not follow, we will be eliminated because the macro environment is market elimination. The ecosystem is market elimination. Whether it is passive or active, we need to follow or we cannot survive.

137. This was a little contradicting to the above mentioned that Mr. Chan was market economy oriented but he also felt forced to compete. They are forced to compete but they continue to adopt a reactive approach.

138. Is there any safety policy in your training fields?

139. Because we are registered as school, we need to completely follow the

instructions. Whatever on the education ordinance, we need to compile with the requirements and this is the legal requirement. The ordinance has explicit requirements on the school structure on fire prevention and protection, as well as hygiene and various kinds of requirements. Those requirements are actually harsh and strict because the ordinance targets at basic and foundation education, which aims at younger students and the protection to them are high. The requirements on institutions are very high too. We think the requirements need not be that high because our students are not twelve, thirteen or several years old. Our students are at least 17 years old or above for wholeday programmes and for night school, they are in their thirties or older. The requirements need not be that harsh but we are obliged to follow the existing ordinance. We think that some of the requirements are unnecessary such as height limit and capacity limit. Adults do not need as many protections. The cost of our service becomes more expensive. Therefore, compare with the universities, our competitiveness are weakened relatively because they do not have those limitations. Simply saying, they can have class of several hundreds but under the education ordinance, we can only have maximum 45 students and our cost become higher. The government, in a lot of areas, and even in the ordinance, cannot allow a real free or fair competition. The ordinance regarding holidays restricts course on Saturday and Sunday but the government is not very strict now. Therefore, it is not totally impossible to organize courses.

140. Mr. Chan raised the education ordinance as an issue similar to that affecting HKFTU but HKCT operated under the requirements of the ordinance. Flexibility in class size is and various operations were sacrificed. Again, the ordinance ought not be applicable to adult education and HKCT should advocate for deregulation.

141. Do you have sufficient space to hold the training exercises?

142. We must have enough space. This must not be a problem! This is a mutual conditioning issue that if we don't have the venue, we cannot offer courses, and this is a prerequisite. We cannot organize course when we have no space or the course is too full, or organize courses in not qualified venues as these are illegal. However, we use the venue flexibly

143. What are the major types of training programmes that your institution offers? Are practical skills development methods in line with industrial practices?

Are theory and practice sessions coordinated so that learning is reinforced?

144. Commerce, computer, art and design, tourism, logistics are major training programmes offered. Similar to facilities, we look at whether we are able to arrange. If we cannot arrange what the course requires, then we would not organize those courses. Therefore for our existing courses offered, if they required practice, we have been able to arrange them. If it can be arranged within school, then it is within school. If not, we arrange the students to have placement in outside agencies. We do not have fixed ratio on theory and practice because different disciplines would be different. For instance, for art and design, most of their time will be in lab or in the studio. But for commerce/business studies, most of their time will be in classrooms. Different disciplines are very different in theory and practice.

145. The programmes offered were work-related . The arrangement of practical sessions was reactive.

146. Is sufficient learning material provided individually to trainees?

147. Overall speaking, due to lack of resources, we cannot say that we are very sufficient. But in library facilities, we are very concern and we have planned to invest a lot to construct. In fact we have the infrastructure ready. We have a team of manpower, a computerized system, and we have put aside a specific venue, though not very large, to establish our library. Now the question is on how much resource we have to allow us to have larger place. Books are not expensive in the whole library. It is the whole system, including place, manpower, and the system that are expensive. We basically have all the things ready but we lack the place. We have confidence that it will be improved because since our long term goal is to develop into normal discipline tertiary institution, this is a must do.

148. The HKCT had relatively primitive facilities in terms of learning materials provided to students given its history of service.

149. Do you have adequate methods to evaluate your students?

150. Different subjects have different methods of evaluation. In general, the trend now is not to have so many examinations. However, it is just some subjects that would not have examinations. Most of them still have examinations. The

proportion of examinations would be different according to different subjects. The evaluations are adequate. As now a lot of our programmes are linked up with professional qualifications. Either students have to take open examinations for the qualifications or we fight for recognition and accreditation from professional organizations and associations. As a result, these are external factors that make us to have quality and we do not have problems in it. There is a new way of working which is to have recognition of academic credits with local institutions, such as Hong Kong Polytechnic University. Also the Spare Time Study Centre of the HKFTU is discussing with us on the issues of credit recognition. These are some new ways of working.

151. *It is true that students have to take open examinations to obtain the qualification. However, it can be viewed that if the quality and evaluation of students meet the requirement of the professional bodies, recognition and accreditation should not be complicated.*

152. *How do you match your training programmes with the requirements of the market? How long it takes and what are the mechanisms for the matching?*

153. We do not have fixed method or working style. We have a team of part-time colleagues and also external consultants whom we will occasionally hear some messages from them. We update our courses according to the message and information. We have a characteristic that we are more willing to develop new courses and this has become our tradition. Therefore this will not be a big difficulty to us as long as we confirm the needs. Of course we have to consider our resources on whether we can organize them.

154. *The above strategy did not give full picture of where the market is evolving as Mr. Chan is passive in receiving information occasionally.*

155. *Are there any quality assurance procedures to maintain the quality level of the programmes?*

156. We do have internal, and quality control mechanism. We have colleagues who are responsible for academic issues to watch teachers conducting classes. They also check, proofread and approved the instructors' examination questions and how they correct the examinations. For the tertiary programmes, we look for external examiners, and examination boards to examine and finalize the grades

of students. We also have questionnaires for students to evaluate teachers' performance. Basically we use what an university use as quality control mechanisms.

157. Would you list down 5 major obstacles that impairing your institution to offer a better workers education? Please list down the above factors in the order of priority (From most important to least important). Can you provide suggestions to solve the top one (most important) obstacle?

158. Firstly, it is resources and followed by manpower. Secondly, it is government policies. Economic change certainly has influence. Population change, in theory, must have influence such as change in age and academic background of students. For instance in Hong Kong since population aging and increase in general public's education level, how we organize courses must be affected.

159. There is no solution to resources. If there were solution, it would be just some external funding. If not, we can only rely on ourselves and there is no other way. We do not have business and the only way (source of income) is from tuition fee. When it comes to external funding, it is related to government policies again.

160. Mr. Chan considered resources as the most important factor affecting HKCT. Followed by manpower, government policies, economic and structural population change accordingly. However, Mr. Chan considered resources as unsolvable issue but the reason why Mr. Chan considered external funding offered by the government not feasible was not clear. Even the government has restrictions and directions attached with the funding, they are the potential resources for HKCT.

161. Mr Chan's additional account of workers education

162. We do not separate the need into workers or non-workers. In HKCT, as there is a wide range of courses offered, we have a wide range of targets. As for working class, majority of them are in ERB programmes. In other courses, they are not working class since as society change, we have moved (upward mobility) upward accordingly. In Hong Kong, I think there would not be too many real workers strictly speaking. The proportion of blue collar in the composition is very few. and majority of them would be in ERB programmes.

163. In ERB programmes, the training focused on several major field of study including office administration training, computer training, security, home helper. The proportion of ERB programmes make up about 40% of HKCT programmes.

164. Although HKCT did not separate the external needs into workers or non-workers, the services provided were targeting at two levels of participants. Mr. Chan's classification of working class into ERB programme was in fact narrow minded as workers need a broad range of learning instead of just skills retraining.

165. Mr Chan's opinions in education/continuing education

166. One area needs to beware is the polarization of education and marginalization of people. If government would like to have diversities in higher education, they have to aware of market entrance and the survival of new comers. Moreover, how to integrate and standardize existing dispersed and differentiated playing rules is also important. As different institutes follow different ordinances, and working under different rules and laws, this is not good, and influences free or fair competition.

167. For the marginalized groups

168. In order to absorb them, government resources must be utilized. In fact the government has a lot of resources, it is a matter of how to restructure the resources, and in terms of resource utilization. I don't think the government needs to directly subsidize this target group such as paying tuition fee for them. The government can apply some pivotal effect or multiplying effect. Of course for those most deprived that the government could not only pay the tuition for them, but also need to solve their problems in living and food. However, what is more important is that we are talking about arrangement in course design and support services/measures, to ease their learning. The government can even utilize community resources. For instance, in course design or in publication of programme materials, it is not necessary to use government resources. The government only needs to announce that a syllabus like the HKCEE directories has been designed, and establishes some recognized qualifications, then the market will fill up the space. The publishers see that there are demand to study the syllabus and examinations, they will then publish the books and schools will arrange the courses accordingly. The market will be mobilized. It is how the government understands the market economy in education and how to use some

resources to facilitate the market to operate more smoothly. Then this would help the marginalized people already. Certainly the government need to understand what these people need. It may not help them if you just put forward a programme because the hinder for them to study is not just lack of programmes. There are quite a lot of programmes in the market. Probably because of other issues that they cannot study. Therefore, the government needs to investigate the reasons and factors to make improvements. Marginalization might only be a phenomenon, there might be quite a lot of other factors. It needs to be study extensively and the solution must be generated from collecting lots of different opinions. It should not be just giving a lump sum of money to solve the problems. It is too simplified and is a waste of money but could not have results.

169. These people are not the target for tertiary education. They require broad range of education and skills training but HKCT was no longer the school for them.

170. Interview with Mr. WU Tat, Advisor to the Hong Kong Construction Industry Employees General Union

171. What are the purposes of your educational services?

172. Trade union's services to worker focus on work and the industries workers are in, and skills that are related to their occupations. Grammar education was provided at very early stage like in the 50s. For example, in construction industry which most workers had low education background, vocabulary classes were arranged in the evening to increase their knowledge and to comprehend literacy. In the 60s and 70s, education needed to correspond to the occupation and the skills required, courses were organized to help the workers to increase their skills and theoretical knowledge. Moreover, some people wanted to learn more in other occupations or industries which they were interested in. Interest and hobby courses were other courses offered. Interest and hobbies, knowledge and culture, and technical and skill courses were organized. Now, more language courses are organized and not simply grammar courses in the 50s. The objective of the service could never deviate from "increase workers' value added abilities."

173. Mr. Wu was more focused on value added abilities. Education and training were to assist workers to better perform in their positions. This was also a reactive approach by providing what the market need.

174. What do you think the educational needs of the workers are?

175. Depending on the time period we are in, workers need to acquire different skills and to know how to use new materials and products. If workers need particular knowledge and skills, then we offer those kinds of courses. The objective is to increase their skill and knowledge. Workers need things that are related to their occupations and the things need to add value to them, such as safety knowledge, especially in construction industry. We organize courses to help them to become safety inspector. We look for professionals to teach including our members who are working safety inspectors or supervisors, representatives from Labour Department, or even professors to speak to increase workers' safety knowledge and awareness.

176. Another area is on labour law. We educate workers how to fight for their own entitled rights. It was started in the 70s and 80s as labour law was started to be

enacted and getting more since then. The direction would not deviate from workers' occupations, works, rights and value-added ability. Like the Skills Upgrading Scheme, we organize courses which the government subsidizes 70% and workers need to pay 30% of the fee. Since workers still want to learn more to equip themselves especially those in renovation or construction field, even though the market is low now. There are so many different work types in constructions and they want to know more in different work types, and even better to obtain qualifications.

177. Mr. Wu raised an important aspect of workers education which is empowerment. It is important to educate workers about their rights and the ordinances concerning their rights. Workers' willingness to learn more to equip themselves might be important to the provision and organization of workers' education. That is, organization of worker's education should provide direction and guidelines to the participants. It should not be just meeting workers' needs or market needs, but should have vision and direction.

178. What are the strengths of your educational services?

179. We are a member union of the HKFTU. HKFTU also advocates the education of workers regarding works, skills and knowledge, and also interest and hobbies. The HKFTU manages a Spare Time Study Center and each member union also organizes courses to their members focusing on its industry, such as safety knowledge and skills upgrading. These courses are popular especially to those younger workers (age around 30 or above). Most workers want to learn, especially the youths, they want to learn more knowledge and skills in different work areas to equip themselves. Most courses would be full and participants found them useful.

180. Workers do have motivation to learn. One explanation would be learning is beneficial to their future development.

181. What are the weaknesses of your educational services?

182. Place is the main problem. We have not enough venues. Some venues are not suitable due to poor transportation. Moreover, some of the venues do not satisfy member's demand/requests. Union is using its own venues as office as well as for training and courses. Sometimes different unions even need to fight

for training venues.

183. What are the opportunities of your educational services?

184. Now HKFTU is working on the Skills Upgrading Scheme and employees retraining programmes. In employees retraining, workers want to learn so that they can change to work on another occupation. However, the market now is poor and they can hardly find a job even after retraining. The market is also very poor in the construction industry and unemployment rate is high. In Skills Upgrading Scheme, workers have to pay 30% of fee and unlike ERB who would have allowance for them to study. Since some workers prefer to learn more while some of them think it is useless to learn, most of the participants in Skills Upgrading Scheme are working. Employment is not what union can solve. As long as the courses help the workers, the union will organize them. If we deviate from this objective, there would be no one to participate. Also in interest and hobby courses like photography, are helpful to alleviate the daily life of members. We organize according to examination and understanding of what members need.

185. The above-mentioned were reactive and relied on government incentives. As both programmes were subsidized by the government in reaction to the poor employment market, they were short-term opportunities.

186. What are the threats of your educational services?

187. We are unlike those commercial schools that we organize according to the needs. There is no competition. If there is no needs from workers, we just do not organize courses. Unlike the commercial school who try to make profit, our aim is to serve members. We charge just some fees to the almost volunteering instructors. The commercial schools pose no threats to us because our fee is low and we use our own venue. The commercial schools need to rent the premises, and hire staffs. Our service is totally different from them that we utilize our members and experienced masters to teach and there would be no competition. If there were competition, the commercial schools would lose.

188. As course organization was based on workers' needs, Mr. Wu perceived no or little external threats. Mobilization of members in teaching was perceived as a strength.

189. Any economical changes that are affecting your educational services?

190. Now the major problem is economic in nature. Workers do not care what political parties, or what political voices they are talking to but concern only whether they have works to do and the salary level. It is not that they are not concern but their first concern must be on themselves. The problem now is that the construction market is poor and workers do not have enough works. Most of them could not have enough jobs to do and it would be difficult for them in these several years. The whole economic environment is poor and in construction field, there is almost only short-term employment. Some of them have already changed to work in other fields. Workers are most concerned with the economic environment.

191. Mr. Wu's perspective was more grassroots that workers concern immediate needs and these needs were comparatively primary such as employment security and salary level related to economy. Political issues to worker were secondary in difficult economic situation.

192. Any sociological changes (e.g. attitudes of the students, cultural behaviour etc) that are affecting your educational services?

193. Industrial reform. Manufacturing industries in Hong Kong need long time to recover, as most of them have moved to the mainland. Even though the government supports to develop high tech industries, lots of the workers are not suitable to work in the industries due to low education background. Unless they are retired, they need to work and as a result, most of them work in the food and beverage industry, and construction industry that required lower education background. Even working as sales requires higher education level now. Workers from manufacturing industry have been difficult. If the market construction is also poor, the impact is even bigger. In fact, some people view that as Hong Kong is a small place, the potential of construction industry is not good. Workers are worried about the future of Hong Kong and we can easily observe some phenomena or influences by rumour in workers. Sense of crisis(危機感)towards the future prospect has been gradually developed in these workers.

194. Any technological changes that are affecting your educational services?

195. As Hong Kong is going through industrial reform, the biggest worry is workers' education level. Where do we allocate the workers who have low education background? In technological development, you are talking about professionals, and the professionals required need to be university graduates but they are just the minority. Food and beverages will never move away. Construction originally could not be move away. The major factor is Hong Kong' economic environment and its international positions. If the economy is good, the food and beverage industry, construction industry and other service industry and entertainment industry are able to absorb these manpowers. If these industries cannot be maintained, these low education worker must have worries.

196. What is your future plan for your educational services?

197. Trade union serves according to members' needs and members' needs follow the society's change and development. Some of them would like to change to work in other industry and some want to learn more. If the union can help them, we organize what they need. If we cannot help them, they need to study outside. Trade union has difficulties in organizing education for the future prospects of the workers in such situation. It requires very big investment and we are incapable to invest. We need the government to subsidize. Even for the HKFTU is also not easy as you may think of how expensive one needs to invest to organize a university.

198. The union assists workers and increases workers knowledge. Majority of education is still relying on the government. If there is needs from members, HKFTU should fight with the government for them. Like in England and other countries, unions organize technical institutions and the HKFTU should also think about it. It was difficult before in the old days but after return of sovereignty, it should be workable.

199. What kind of manpower is needed in the market? What level of job (managerial, supervisory, clerical or unskilled levels) has the highest vacancy?

200. It is difficult to know what industries and what levels of job are better in the market as every levels of work are poor now.

201. How do you recruit instructors for the programmes?

202. It depends on what the programmes and topics are. Like those skills oriented courses such as painting, pumbling and wood work, they are taught by masters who have lots of experience with junior secondary or senior secondary education. Now they have skill examination mechanism that they have to pass and with their rich experience, they become our instructors. For like work safety, we will find our members who are safety inspectors or officers to teach. Some of them are polytechnic college graduates or even university graduates. Like the safety card course, it is taught by our members. For those courses not relating to our industry, we might not have the instructors among our members and we need to find other people to teach and it would depend on the situation then.

203. Do you think the level of the courses is appropriate to your staff's abilities?

204. Within our industries, we are able to handle the courses. For those interest course, we need to look for other people to teach and depend on the situation. Like computer, we do not have computer course now but we must find someone qualified. Even in interior design and drafting, we look for more professional instructors.

205. Do the instructors have previous training on how to teach?

206. Some of them are teaching outside. Some of them teach with their experience. They have not received formal training in education. They are not bad at all because they have experience and know what workers need and use their language.

207. How are your training facilities? Are they sufficient?

208. In terms of notes, projectors, electronic equipment, etc, we can arrange them. If we don't have the equipment, students may not learn as good. Of course we cannot achieve the level of tertiary institutions. We have some theoretical course and some practical courses like those in pumbling, wood work, painting, and we need to have practices. We organize them in some rented industrial buildings and in some of our own premises. Industrial building rent is low now and usually with good transportation which is convenient for workers.

209. Is your equipment equivalent to the present practice of the market?

210. Must be correspond to the market or they cannot find a job in the market.

211. Is there any safety policy in your training fields?

212. There must be safety policy. Each course, there must be one to two lessons about safety in work safety and industry safety. They have to adhere to the safety policy. Moreover, they have to get a safety card in order to work.

213. Do you have sufficient space to hold the training exercises?

214. Practical courses take up most space and we organize course according to the space we have. Unlike Construction Industry Training Authority (CITA), they have a lot of spaces. We are more like supplementary and they are the major trainer. We offer those courses which they cannot arrange. For instance, we arrange short term courses as supplement. CITA programmes are more for the youths who cannot continue study. They receive one year of basic training and then arranged to follow some masters. However, in these ten or more years, few students really work in the field after study except in few areas such as electrical installation and machinery but not in plastering and tiling, bamboo scaffolding, etc.

215. What are the major types of training programmes that your institution offers?

216. Apart from the skill training courses about constructions, and the hobby courses, language courses including mandarin are also offered. These are done by cooperation with HKFTU. We are not able to arrange with our single industry union only and it must be done by collective power of with HKFTU.

***217. Are practical skills development methods in line with industrial practices?
Are theory and practice sessions coordinated so that learning is reinforced?***

218. In practical skill training, the training is able to follow market requirement. Some of the courses include both practical and theoretical elements, some with only practical training, and some with only theoretical element but demonstration to students will be performed due to not enough space and sometimes students do not have that much time.

219. Is sufficient learning material provided individually to trainees?

220. We will have notes regarding the topics and the contents. Sometimes we will introduce new products and materials for constructions and members are very interested in understanding the new products, in learning how to use them, the process involved and the end products or results. We will organize these courses and some companies would also liaise with the union to market their products. Our members have the needs to update themselves and information would be enough for members.

221. Does the curriculum take account of future industrial training needs and technological changes?

222. Now we are matching up with the development to work on skill advancement. You can say that we are helping members to change following the market development. However, we are not the major party. The major party is the government and we only try to help members in occupations with what union can do and this is the union's main objective.

223. Do you have adequate methods to evaluate your students?

224. Some of our courses evaluate students according to their attendance. Some other courses evaluate students according to the products, such as cupboard, they complete after a number of classes. Different certificates will be issued to students if they meet the requirements. For the Skills Upgrading Scheme, the courses are co-organized by the Vocational Training Council and the Education and Manpower Bureau, they need to meet their requirements and follow their instructions. Students need examinations and in question and answer format.

225. How do you match your training programmes with the requirements of the market? How long it takes and what are the mechanisms for the matching?

226. We look at the development of the industry in terms of skills required, including new materials and new skills involved; according to members' reaction and requirement; and look for members involved in these areas to discuss. Or we will find those product manufacturers or distributors to organize talks for members. We also look for those who have used them according to construction requirement and make the notes for students. We must follow the market's requirement. We cannot organize those that the market does not have

or need.

227. *Are there any quality assurance procedures to maintain the quality level of the programmes?*

228. We issue questionnaires to students to collect their opinions on the instructors, on the arrangement and procedures of learning, on the venues, and on the tools and equipment utilized. Some courses do not have these questionnaires. The instructors are our members and they are the masters in the training area. They are very close to the participants and they will go eating after class together. They will also refer work to each other among themselves.

229. *Would you list down 5 major obstacles that impairing your institution to offer a better workers education? Please list down the above factors in the order of priority (From most important to least important). Can you provide suggestions to solve the top one (most important) obstacle?*

230. Now in Hong Kong, there are many ways to study. There are many different ways to obtain a bachelor, master, or even Phd degree and not necessarily following the traditional path of study.

231. Like in industrial reform, how workers can keep up with the changes? For the younger workers (30+), most of them have secondary school education. If the government can provide assistance to these people in accordance with the current technological and industrial development, they can adjust and change according to the change in industry. However, a lot of these people have burdens like family expenses and some of them even have negative asset. Therefore, they need both work and further study at the same time and they need to be self-motivated. There are a lot of people in Hong Kong in their 30s to 40s who have the education background wanted very much to keep up with the industrial change. This has very big relationship with their life, occupation and prospect. Through further study, they want to be able to keep up with the industrial demand. To those with low education background, they have no other way. They will work in the service industries, food and beverage, constructions and sales. However, only the government could predict whether in future there are such needs in Hong Kong for so many work forces.

232. Now industrial reform is that the manufacturing has gone, and the other industries, such as constructions are poor that lead to other industries like sales also become poor. If the economy improve, it could solve some of the

problems. But there are people who have not bad education background (like the technical staffs, or even engineers in factories, that the industries moved to mainland and their works were discontinued) wanted to learn something to keep up with Hong Kong's industrial change. Some of them who have abilities are doing that like going overseas or taking correspondence courses. However, how the government can help these people as a whole is the challenge. The saddest thing is that what industries are in need in future and what kind of human resource is in need cannot be seen. The whole economy is poor now and it is not recovering.

233. The main problem of the government is the deficit. In fact, the government is working on something to help people to adjust to the industrial and market change. However, they still cannot meet what Hong Kong really need. Like in the open institutions, there are so many courses offered but they are not organized or structured. There are also some people who have financial problems and cannot study. The government is working on the issue but still cannot satisfy the needs. The government very much wants to work and I can see they have done a lot of things but some of them are not practical enough and some of them are not comprehensive enough such as not enough places for so many people.
234. The whole world is not doing well. The Cyberport in Hong Kong is not good now. Developing biotech industry is not that easy. In Hong Kong there is only export, tourism, and financial industries, but financial industry is also poor now. Though the situation is not permanent, but it needs a long time to overcome. In general those young and those with education, they need to learn under this situation and difficulties. However, whether they are financially feasible or they will look for the government to help, but the government is under deficit.

235. *Mr Wu's additional account of workers' education*

236. In workers education, we are now focusing on the younger generation. For the older people, they have their problems associated with age, physical problems and family issues. Some of the younger ones have completed A-level or even polytechnic institution. When industries were moving to mainland, they moved with the industries but after a certain time there were enough manpower in mainland and they had to return. Another part is that the industries are disappearing. Even architects, accountants, and lawyers could not be employed. There are a lot of professionals. What kind of education is needed for these

people depends on Hong Kong's future direction and development, and what kind of industry could help these people. In education, society's development must be combined. Deviation from it is useless and could not help people.

237. Interview with Mr. TAM Yiu-chung, Vice Chairman of HKFTU; Legislative Council Member; Chairman of Employees Retraining Board; Chairman of Clerical and Professional Employees Association

238. *What are the purposes of your educational services?*

239. I think in the 80's in foreign countries like England and Australia, they put emphasis on workers education. In fact, the HKFTU has been concerned about the issues before that. At that time we differed in background and was that we organize workers night school. The reason was due to workers employment and lack of opportunity to attend school in the 50s and 60s. Workers in that period had relatively few opportunities to received education and they have to study at night while working. The demand was there and in the 80s the situation got better, and HKFTU changed the model of workers night schools as in the past they taught something to upgrade workers' basic knowledge. Later in the 80's we became aware that not only the service can upgrade their basic knowledge, we have to give them more on other knowledge and skills, and even in cultivating interest and hobbies. Therefore, we beginning in the 80s organizing a lot of training courses. We feel that workers have such needs and the society has also such needs, for them in spare time to obtain and grasp more knowledge and skills and hope that their cultural life after work will be enriched with more knowledge and skills. Our direction is the same in millennium but the course and content has been adjusted like in recent ten years, teaching in computer usage increases. The range of courses/curriculum are now much more than before because people basically receive 9 years of education and most of the workers have qualification of Form 5 or above. Therefore, they look for wider range of learning. We hope we can be applied (發揮) on how to help on training manpower/human resources through this kind of second chance learning. Of course there are differences between HKFTU's service and regular education institutions. We are more informal, trying hard to fit participants' working hours, and consider their needs when we plan, just like participants-centered.

240. *Mr Tam presented the evolution of HKFTU's service which had been evolving from basic knowledge and job skills focus to personal development focus. With better education by the government, expectation of the learners increased. However, Mr Tam still regard the service as a second chance learning opportunity for workers instead of lifelong learning. This showed how HKFTU position itself in workers' education that although personal development had*

become the focus, the service had not evolved to where lifelong learning should be the model for personal development.

241. What do you think the educational needs of the workers are?

242. There is a new trend gradually developing that Hong Kong workers might not only need to work in Hong Kong, but also, as the economies with mainland are merging, workers need to go to work in the mainland. There are two areas of work in mainland including professional services and skilled work. Also the mainland has a set of qualification recognition structure and assessment rules and regulations 評核準則 but we have just started to prepare to plan. Therefore, if workers in Hong Kong who want to work in mainland might need to consider how to adapt to this set of assessment. In these two years, we have discussed with mainland on how to participate in these assessments through training and obtain the recognized qualifications in order to facilitate our workers to go back to work in mainland in future. We estimate that there would be no problems and we have confidence especially on cooperation with Guangdong. For example, through some strengthened training, and participating in their assessment examination to obtain the skill qualifications.

243. *What Mr Tam mentioned were more the needs from the market and he did not mentioned about what workers' needs would be. Mr Tam saw potential or developing needs for workers to work in the mainland but questions like whether most workers are willing or prepared to work in the mainland, and what workers' concerns would be working in the mainland were not examined. However, making connections to have qualifications recognized created excellent added value for the courses and programs.*

244. What are the strengths of your educational services?

245. Our advantage is that we have a very good network system. We have 170 unions and each of them have their own clubhouses and their members which total amount is about 300000. It would be very useful when such network extends. You can see that our courses, though not publicized a lot, are so known to the public, and the courses are practical and continue developing. The course fees are cheap and they are so popular. We use these strengths and network to develop. In future, our direction would change according to future development like demand for skilled workers when the economy merges with

mainland, we hope to work closely to the demand.

246. The direction of development was also market driven. HKFTU had the strengths in extensive network and membership but Mr Tam did not utilize these strengths to examine what workers needs in terms of education and the changing economy.

247. What are the weaknesses of your educational services?

248. In terms of weakness, our connection with participants is weak that they usually read the information about the courses and then apply. After taking the course, they just leave and I think the connection (維繫) is quite weak, probably because our quantity of courses is large and therefore connection is weak. Also the manpower is not enough so that we can only arrange courses and not able to keep connections with participants.

249. The weak connection between HKFTU and participants was a very big limitation and weakness. HKFTU did not utilize its extensive membership to develop probably because of weak connection between HKFTU and members, and among members. Manpower would always be one weakness but HKFTU's did not put enough effort in maintaining close connection with participants which most unions would have focusing.

250. What are the opportunities of your educational services?

251. The government now more value the concept of lifelong learning and this is exactly what we advocate like second chance learning and lifelong learning. The government has finally committed to this and allotted funding to assist workers to study further and this is a good work. However, we in the process do not have much benefits because the government selects the continue education divisions of the eight universities and provides resources to them to organize courses. We totally cannot share the resources and we think this is not desirable as we have such close connection and relationship with the labours and if we can obtain the resources, we can provide better services. But it is a pity that there is still a missing link that we cannot benefit from the government.

252. The reasons why HKFTU did not get the financial resources were not mentioned. The service could be improved if it received financial resources, it could be that

the service was considered by the government not good enough to obtain the resources and operate the courses.

253. *What are the threats of your educational services?*

254. At present, there is no obvious threat posed by the eight institutions but as they develop, we might only be able to work on the interest and hobbies courses in long term and it would be quite limited our development (發揮) in other aspects.

255. We have totally no government subsidies. We only rely on fees from courses organized and 以戰養戰, but our advantage is our administrative cost is low and we have our own property and clubhouse. We rely on these to develop. Of course, if you want to develop to certain scale, there would be certain extent of difficulties or there are certain difficulties if we want to move up from the ladder.

256. Mr Tam obviously saw the threats and the difficulties in service development although he presented as there was no immediate threat.

257. *Any political movements that are affecting your educational services?*

258. The government, in this area of learning, views that you would develop and organize by your own. The government appeared to have no intention to assist. There is no policy to assist this kind of learning. If you can organize, you organize. There is no assistance from the government but only some hindrances occasionally from the government. Sometimes they interfere with the content of the courses offered and sometimes compare our service with schools which there are a lot of regulations to follow and many things become impractical.

259. *Any economical changes that are affecting your educational services?*

260. Workers now have longer working hours and their earnings are not as stable that people's interest to learn would be affected. This is what I feel as a problem. Now we should expand our service targets. For example, other than workers, I think the elderly should be the direction of development. Such as retired people, I find some of them are not that old and they have much interest to keep up with the society and learn new knowledge and skills. I think how to help the retired people to learn continuously has lots of space for development as population aging.(15:40) This will not be done by the universities as their operating cost is

high and the government will not subsidize these people. I think as our fees are low and also practical, it can be workable.

261. Mr Tam saw the opportunity of development (education for the elderly) due to change in economy (fewer enrolments). His observation might be originated from his work in the Elderly Commission. The concept was more adhere to lifelong learning but it should better be viewed as a service for retired workers to enrich their life. The core service in training workers for their vocational needs should still be the focus.

262. Any sociological changes (e.g. attitudes of the students, cultural behaviour etc) that are affecting your educational services?

263. Basically people would like to have broader range of knowledge and know something about different disciplines, and they are not looking for in-depth knowledge. This is the trend, especially among the youths now. As we can only offer entry level knowledge courses and not in-depth courses, and our service do not have a official qualification accreditation structure (正規資歷認可架構), we probably have to reconsider our model when the development goes to the way that people need to learn with official qualification accreditation structure, because we might not be as authoritative (權威性) in courses as the 8 universities or being recognized by the government or in terms of status (地位). We might not be able to compete with them if we need to. Therefore, how the position and direction we are in now will be replaced by others in future, and whether the participants will be drawn by other institutions, as the participants request more or higher levels of learning, and that we might not be able to provide what they need and satisfy them are the questions. Of course, our service and this kind of training are not based on our achievement academically and this is not our strength, because the universities have their academic status established 學術地位. Therefore, we only organize courses not in the normal discipline and also not university level courses and we will develop in the basic level. Whether the space will progressively diminish is what we need to addressed(正視).

264. The trend is that participants are requesting gradually higher and higher level of courses and as it moves along, our service may move to focus on interest/hobbies and leisure oriented courses.

265. HKFTU's service actually matched with what Mr Tam said about the trend of

having a broad range of knowledge for participants. HKFTU's courses are comparatively cheaper and short-term which are good for participants to get a wide range of knowledge. However, Mr Tam was not somewhat contradicting himself about the trends that he also said participants were requesting higher level of courses and doubted HKFTU's position in the field. A closer examination to the trends would be helpful for HKFTU's development.

266. Any technological changes that are affecting your educational services?

267. Technological development does affect the service. For example, as a lot of learning in future can be taken place at home through electronic media and ICT development, classroom teaching might not be needed anymore and the effect can be achieved even when people are at home. It might affect us in future (未來日子).

268. If we need to follow up, we might have to assess the realistic situation constantly that if we find that some aspects are lacking, whether we can arrange other new contents for them. Since teaching by ICT usually are for the provision of more general, broader knowledge which more people can participate. However, if we have something more uncommon (冷門), it might not be conducted through such method since the cost is high. Therefore our response and reactions are relatively quick that such as we observe that lots of people have watched Korean movies and they want to learn to understand some Korean and we can arrange and provide Korean class very quickly. If you do it by ICT, it might take you a lot of time to set up and the cost is high.(20:53)

269. Resources were the most important factor to using ICT in teaching. HKFTU would have difficulties in implementing ICT in teaching as their limited resources would restrict development of ICT.

270. What is your future plan for your educational services?

271. One aspect is on the linking up with the mainland and we will see if we can develop in this area. In Hong Kong, if the government establishes the qualification system in future, we hope we can participate such as offering training courses and programmes in order to help workers to take the qualification assessment for official qualifications. We hope we can have a role here. Like in the past, for electric workers to register, HKFTU provided courses and assisted (保送) them to take the examination so that they can pass

and obtain the qualifications. If the government develops such structure in different industries and work types in future, we wish we have a role to utilize (發揮) ourselves.

272. *Mr Tam focused more on the work to build more and better network with the mainland. It should be cautious not to overlooked the needs of workers in Hong Kong. Mr Tam appeared passive in pushing for the qualification system. The question became "what should HKFTU do to get the role explained by Mr Tam"?*

273. *What kind of manpower is needed in the market? What level of job (managerial, supervisory, clerical or unskilled levels) has the highest vacancy?*

274. Now I see a trend in Hong Kong and also in mainland is that there are many people who understand theories but there are few people who can practically work and operate. Probably the skilled technical workers, those who know how to operate machineries, gradually diminish. Since the youths hope that through studying they can work as white collar(文職) or as professionals like engineers, accountants, etc. They are reluctant to work as a skilled technical worker. Some of them (怕) fear about the harshness and some of them fear about low social position in the society and low salary paid as a skilled worker. There is a missed link in the society that there are people who have no skills at all and low education background, and there are the professionals. In between which a lot of things need skill workers to work on have fewer and fewer people to participate. This is a missed link 脫節. The government needs to think of some methods on how to train such manpower and this kind of training has several levels. One is to raise their social position and the salary level. If there is a need, they will be adjusted by the market. Secondly, provide access routes and contacts with the factory owners and employers. There are factory owners who told me that workers in this area are very difficult to find or recruit. There are lots of machinery and facilities which need repairing, maintenance and installation in a factory and these workers are very difficult to find. Whether we can follow Germany that two routes are provided in education, and that one is on understanding theories and the other on practical operation. In this aspect, we are leaned on one side and this is not a satisfactory situation 理想情況.

275. There are such vacancies in the market, though the number would not be very big, and this kind of work required people to work in the mainland. For example, recently an factory owner in the field of electric motor for garment

cutting told me that he wanted to find skilled workers but encountered difficulties. He suggested if we can train such worker in Hong Kong and it should be workable. In also advance soldering (精密銲接), and in some skills which have high requirements on skills like carpentry, workers are difficult to find.

276. Mr Tam saw a need in skilled workers. Skilled workers were actually more in need in the mainland instead of in Hong Kong as most of the manufacturing industries had moved to the mainland. Education and training to train skilled workers diminished as there were so many workers out of jobs. There were so many skilled workers in different industries when manufacturing industries were flourishing. As more and more manufacturing industries moved to the mainland, lots of skilled workers were obliged to change to occupations which they were not trained for. Mr Tam's wish for the government to take up the training responsibilities for manpower which there was not enough job opportunity might be unrealistic. To what extent what Mr Tam heard from factories owners reflected the real picture for manpower was really a question.

277. How do you recruit instructors for the programmes?

278. Since the courses organized are for adults and they have certain analytical ability. In recruiting instructors, we will consider their qualifications and education, whether he/she can fulfil the job, and also face to face interview. We also provide information to him/her including background information of participants. Moreover, we need to check their syllabus and their content prepared, and we might let them try and see how participants react. Finally, there will be some questionnaires and random telephone surveys to see participants' comment on the content and the format. If we find the instructor is qualified and he/she is popular, then we let him/her to teach more courses. There are instructors who have taught for more than ten years because he/she is familiar with the content and is popular to students. Therefore, he/she will be allowed to continue to teach. There are many routes to recruit and majority is through introduction by others, and self introduction if he/she has some specialties.

279. Do the instructors have previous training on how to teach?

280. In this kind of adult education, it really depends on the instructor himself/herself as some of them are not working on teaching related work but they would like to

(傳授) teach the skills they possess. Probably most of them learn from their practice and experience, and occasionally we have some training and have some people to teach them in order to increase their ability to teach and to inspire them.

281. There were no curriculum in the courses but relied on the instructors to give whatever they possess. It would be a potential obstacle for qualification accreditation of the training courses.

282. How are your training facilities? Are they sufficient? Do you think the training facilities and aids of the training centres adequate in their support of course content and method?

283. In term of training facilities, as space in Hong Kong is expensive, it would certainly be better if the classroom can be larger and number of students would be smaller. For the teaching facilities, if needed, we do not have any problems, like powerpoint is so common. It increases participants' involvement in learning. If we are able to arrange the facilities and equipment, we will do it. Depending on the subject and the need, sometimes they need actual sample, demonstrations or operation practice since it is difficult to just teach just orally now.

284. Adequate training facilities and equipment would be an asset for service development.

285. Is your equipment equivalent to the present practice of the market?

286. In fact the equipment can match with the market as when the product is popular in the market, very soon the suppliers will bring them to us. Therefore, we should not have many problems. When there is a demand, there is the supply.

287. Is there any safety policy in your training fields?

288. There are certainly safety policies as there are some courses with potential risks, and we must be careful to avoid problems. Safety policies will be specially concerned. Since most of or courses do not have big risk, and the participants are adults who will not play around and are disciplined. So far we do not have big problems. We do not have those courses in labs mixing chemicals. At

most it is the cooking class that participants will get a cut or burn; or it is not surprising that they get cuts in barber class. But we would not have big problems since our courses do not have much dangers and risks.

289. *Do you have sufficient space to hold the training exercises?*

290. If we have more spaces, we can organize more courses. However, if we have more courses, the coordination and organization workload will be very heavy. Therefore, we are moving step by step that when we are stable and have the prerequisite conditions, we will take the step. When we take the step, it will be organized in different locations so they can ease participants of different districts and will not be over centralized because it may not be convenient to participants.

291. *What are the major types of training programmes that your institution offers?*

292. For such details, you would better ask Mr Leung and he is more appropriate. I can only speak of the some future direction of development. One of the direction is the qualification systems, no matter it is in Hong Kong or in the mainland. The other is on the retired people. I think these two aspects have lots of potential for development. Local courses are mainly on interest and hobbies, and on new skills.

293. *Are practical skills development methods in line with industrial practices?*

294. We will constantly monitor the market on changes and what the need are. We have health and exercise courses which are very popular as we aware that in the market females are especially concerned about body shape and health. These are popular courses.

295. *Are theory and practice sessions coordinated so that learning is reinforced?*

296. Pretty much can do! If there are courses which require practice and when the classroom is not suitable, they would go to other suitable venues to practice. According to the needs, some even go to outdoor environment. It has to be considered when organizing the courses about whether we can do it in terms of space and facilities. We do not want to give participants an impression that there are only taught courses and do not have practical elements, or the practice facilities are poor. We hope to be able to provide suitable facilities and instructors according to the needs of the courses. HKFTU, in looking for

teachers and facilities, is advantageous since there are so many industries under HKFTU and it would not be too difficult to find instructors and facilities.

297. Is sufficient learning material provided individually to trainees?

298. I have not heard of any special problems since if we have not prepared well, we do not organize the new courses. If we organize the new course, we will also update and upgrade the contents as when the course is not well organized, there would be no applicants and the course cannot be continued. We will look at whether the course is attractive and whether there are many applicants, or when we observe that if soon after the course started that many students have not returned, then we have to concern about that.

299. We do not have resources like books or other information for participants to lend because we are unlike the normal universities who have libraries and other resources. We lack these. We even do not have space for them to stay behind as they almost need to leave right away after class.

300. This was another potential obstacle for service development. For more advance level courses and training, reference materials would be essential.

301. Does the curriculum take account of future industrial training needs and technological changes?

302. Our service would adjust (配合) according to the future needs of industrial training and technological changes. Like in adjusting to future qualification system and skill training, there would be certain difficulties at the start of implementation. We do hope that in the qualification system the government should only, in some work area, act when the conditions are matured. Moreover, there should be clearer curriculum and course content and, these contents should be set by the government together with employers, employees, and professionals. We hope we have involvement in the setting up process and as this system is gradually established, we can train up some people according to the content and need. However, the requirement would be different since the qualifications required assessments. We think this direction is a must (必然) as the demand now is, in fact, professionalization. Like "Ji Ching Sheung Gong" (持政上崗??) in the mainland and as it is getting more systematic and professionalized, this must be the direction. Therefore, we understand the direction and we are willing to proactively act to have involvement in the process

so that we can follow and move up.

303. Mr Tam presented also a passive role in curriculum design and meeting industrial needs. Moreover, if the external direction is professionalization, HKFTU's service was not working towards such direction.

304. Do you have adequate methods to evaluate your students?

305. I think at present most of our courses are on interests and hobbies, classes are conducted and we issue proof of attendance. Unless they need to participate in some open examinations for qualifications, we also have these courses and participants can try to take the examinations. For example, there is open examinations for LCC and participants can try to take the examinations. Our style of working (作風) is “open-door” that we welcome any applicants. However, when “exiting” they need to consider by themselves if they want to take open examinations or they just want to know about the content, and it is their choice.

306. Mr Tam and HKFTU's service needed to consider if their working style adequate to meet the development of workers' education and qualification attainment.

307. How do you match your training programmes with the requirements of the market? How long it takes and what are the mechanisms for the matching?

308. I think the matching required some time as we think it should not be rushed since when it is rushed, things might not have matured. We are starting from scratch, and I think it should not be mandatory at the early phase. Mechanisms should be progressively building up with the objective of making the qualifications workers obtained are recognized by the society. It is not necessary to make it mandatory to force the workers to follow in one step. In fact, the purpose to them to follow is for value-adding.

309. If the external demand was to have qualification, the benefits and the value added from receiving training with recognized qualifications really help workers to find or secure jobs which were their basic needs.

310. Are the proportions between different disciplines in balance, e.g. theory, practice, on-the-job or off-the-job training, etc?

311. We can maintain the balance among theory, practice, and job training. We basically do not have many problems.

312. Are there any quality assurance procedures to maintain the quality level of the programmes?

313. It is actually market driven. The participants are adults and if the instructors are not qualified and they cannot learn from them, they will not even participate, since they are paying for the course and they have a choice. It really depends on the consumers and if we heard from them that the instructor is not conducting well, we might cancel the course. We will collect feedback from participants and the consumers nowadays know well about their rights. Therefore, we do not worry much in this.

314. Would you list down 5 major obstacles that impairing your institution to offer a better workers education? Please list down the above factors in the order of priority (From most important to least important). Can you provide suggestions to solve the top one (most important) obstacle?

315. Regarding obstacles, I think the government in this area do not have real policy that if there are someone who wants to organize, then they just organize. Because the government allocated her efforts and resources in regular education, therefore there is still not a form in this area. I believe the Manpower Development Committee will develop (發揮) something (have significance contribution) in this aspect as the development progress. Firstly, it is the government who does not have policy, and has not pointed out direction of development. Secondly, we have only started to consider qualification accreditation system now which has been developed long ago in foreign countries or in the mainland. If we have the system, I think it would ease the assessment of training quality and societal recognition can be achieved.

316. Moreover, the government in resource provisions basically let you to manage yourself as she think that most of them are working and had no specific assistance. Only recently that there are some funding for lifelong learning but they are very tight in control. Only the eight universities would be able to get the resources and others could not. The whole policy to organizations like us and the courses organized for workers could not get practical assistance. Such kind of education is not present in the government's mind and it is left for your

own operation and management.

317. Therefore, sometimes we ask to borrow the classrooms of secondary schools, and it looks that they welcome such arrangement but in practice, it cannot be achieved. That is, the resources in the community cannot be fully utilized.
318. The government do not have any direction and policy in this kind of education and do not have any assistance to it.
319. Probably the government needs time to change. The government might be considering step by step and as the previous focus was on education reform in regular school and education. I think as there is structural change in the economy, this is the aspect which require a lot of work and effort. I have confidence that the government will put more focus on this than before progressively in future. But it requires some time and the government might only be able to slowly figure out the direction.
320. Economic factors have influence as now the working hours are prolonged and their salary and works are unstable, these would affect the workers' learning. We feel that, as the economy is restructuring, in fact more training should be organized instead. However, it has been difficult in the actual operation as the employment is not stable, people have to put focus on their work first and put other things aside in lower priority.
321. There is a dilemma to the workers as on one hand that they put aside training and focus on their work, they would be behind in terms of new knowledge and skills or be stagnant. Therefore, we found that female white collars are actually participating in more training. Probably because they have more stable working hours and work. Also more civil servants are participating. For men, they probably have to work very hard (奔波) for their work and therefore they have fewer chance to have training and learning.
322. *Government policy again was the first obstacle mentioned but Mr Tam was more positive towards the government. Lacking concrete policy in worker's education and qualification accreditation system hindered the development of HKFTU's service. Mr Tam indicated that government resource allocation leaned on the tertiary institutions. However, it would worth studying the reasons for not getting the resources in lifelong learning.*

323. Mr Tam's additional account of workers' education

324. A big problem is that we face a knowledge economy and in the population structure, there are quite a lot of people with only Form 3 education or below

(around 1million). How these people could successfully change job through training and education in future? It would be more and more difficult. Unless the economy is improving and that the service industry prosperous that the employment situation can be eased. Otherwise, it would be very difficult in such economic situation. There would be some people who can change job successfully through training and education but not all. In addition, since nine years free education, people who attained Form 5 level or even university graduates, the society has a general view that they cannot reach the expected result. Probably, they also need training. Also there is the missing link that some people are not willing to work on some industries like jobs that are too tough and too dangerous. But there are not enough positions in the white collar for these people and this is a structural mis-match and this is the situation now. It requires long period of time to improve. The unemployment rate will remain quite high while there are some works which no people are willing to work. The government might need to consider, as life expectancy is prolonged, and as people in their forties or fifties are difficult to change jobs, how these people could manage their life then?! I think these are the big problems. It requires changes in policy with direction which has taken the situation into account.

325. Interview with Mr CHENG Yiu-tong, Chairman of Hong Kong Federation of Trade Unions (HKFTU); Legislative Council

326. What are the objectives of your education services?

327. The objectives of HKFTU's education service are to increase workers' education level and competitiveness; to provide appropriate and up-to-date career assistance service; to assist members to advance according to market needs; to advocate development of vocational education and government's focus and concern regarding worker's needs; to organize training courses and provide lifelong learning opportunity to workers; to provide opportunities to attain higher qualification by organizing vocational education with overseas and mainland institutions.

328. I believe HKFTU's education service focuses on how to increase workers' knowledge and skills. As we know in Hong Kong there are quite a portion (about 1.3 million) of workers that are only Form 3 educated. However, if we look at the structural change in global economy and especially the change in Hong Kong, such education level right now are not adequate to handle the economic development. That's why we have to focus on, other than grammar education to increase knowledge, another route which has to be developed and that's vocational training (jik yip fun lin). Through vocational training, our education service aims to increase the quality of the whole workforce. Participants would not just equipped with grammar and knowledge which they are basic and general education (po cup kau yuk), but also equipped with vocational skills and then we can increase the quality as a whole. So we hope through such education service we could give the government, in their consideration of policy development, to establish how to progressively bridge (ham jip) these vocational training with normal, traditional education in terms of qualification. I have lots of contacts with workers and they usually face the difficulty that they are Form 3 or Form 7 (secondary) graduate. They cannot attain university level and their prospect end there for life which I don't think it should be that way. I think we have a practical problem that there are some workers could not continue their study because of various reasons, there are people who have low interest in grammar study and no matter how you train them, they just could not follow, and there are some who study very hard but still cannot follow. So we think there should not be just one way of getting to university and better prospect by going through traditional grammar school. We need to help those people who cannot follow in grammar school but as long

as they work hard, they can succeed in vocational training and education. We have some workers who are very outstanding in learning vocational skills and even engage in research although they are not good in grammar school. Therefore, the government has to encourage people if the route of grammar education is not successful, they try another route which is vocational. We have visited England and Australia to learn and gain experience from them. Other countries are working in such a way that when vocational skills are equipped and built up to a certain level, such qualifications are recognized. Therefore there is no need to regret about unable to get to university and one's prospect just end. Instead they can increase their education level through studying in other courses. Therefore, HKFTU's education service's underlying objective is to increase workers' quality as a whole to facilitate workers to face the challenge from globalization of economy and change in economic structure in Hong Kong now.

329. *Mr Cheng stressed the importance of vocational education. He also presented his view of vocational education that it should be of the same importance with normal grammar education. He presented some inadequacies in the education system that there was a gap or defect between school and work that students of grammar school were not equipped with enough vocational skills. Students who could not follow regular education had few opportunities to continue learning. Workers who could not attained university degree seemed to have limited prospects. HKFTU's education service seemed to be filling the gap and provided opportunities to workers to learn with low achievement in regular education. Mr Cheng also presented the lack of recognition in vocational qualifications made workers more difficult in facing challenges from economy changes.*

330. *What are the strengths of your education services? What are the weaknesses of your services?*

331. HKFTU is the biggest trade union in Hong Kong with more than three hundred thousand members. We have stable participants sufficient enough to sustain diversity of courses. We have extensive membership network. We understand the needs in different industries and we have been participating in different government's committees to advocate workers' right and welfare. Our education service has provided opportunities to workers in retraining and skills upgrading. Since the Spare-time Study Centre was established, the service has been expanding that there are more than thirty centres operating in different

districts offering more than one thousand courses to workers. Our relationship with the mainland has allowed us to organize accredited programmes with mainland institutions. We also cooperate with overseas institutions to organize internally accredited programmes.

332. Education service has been the focus soon after HKFTU was established. In early 50s, workers faced the problems of "lost medication", "lost education" and "lost employment". "Lost medication" means there were not enough medical facilities and the facilities were not very comprehensive. "Lost education" means there were not enough education facilities. Lots of children had to work when they were not yet matured. HKFTU organized "literacy courses" ("sik ji ban") and vocabulary classes in its venues to members and members' children. We had members who did not know how to sign for their salary or they did not know any calculations that they were cheated by their employers. HKFTU organized classes to teach writing and calculation and basic knowledge. In addition, the union provided literacy education for members' children. Since "lost education" means there were just not enough school in the society, the union had such a role in that time. Later on, we organized with other unions to organize a normal school and it was cooperated with the Church and the first was "Workers' Children School". Moreover, the Education Advancement Society for Workers in Hong Kong and Kowloon (EASWHKK) was in fact comprised of union board members and they organized and cooperated with the church. The result of Worker's Children School was outstanding. This is our strength at the early stage that in the perspective of education we are a group and a community (kwan tai). Of course in the beginning of 80's we saw a more obvious trend that workers had to acquire more and more vocational skills, which they have not acquired enough in grammar school. What they have learnt in grammar school are knowledge and grammar but when they work, they may not be all suited for their work and they have to go through extra mural studies. Such study is according to the needs of their works and they learn things which they have not fully acquired before. That's why in the 80s' we organized the Spare-time Study Center and most of the courses were vocational based and skills training to ease their works. We focus on different industry and we organize in the venues of different unions. For example, in fashion and textiles, we organize courses in the textile industry union such as suit design, cutting, sewing, and design. Moreover, in cocktail mixing and cookery, we organize training in the hotel union and restaurant union. So the training organized are directly related to members. Also we organize Letter of Credit, Custom and trading administration, and LCC courses for the white collars who work in the office and

need the corresponding knowledge and skills. Such skills and knowledge training were popular to workers in different industries. As the economy grows, now multimedia design and information technology are what workers need and they welcome these courses. Of course our major strength is on having more than 170 unions and more than 300000 members in almost all industries. So when people say they need certain courses, as the relationships between the unions and the industries are so close, instructors and tutors can be easily found. For example, instructors can be found readily from the construction industry union when construction and renovation training is needed. Moreover, through such teaching and mentoring (yat gau yat chuen), those participants can easily enter in the industry and easily increase their vocational skills to find a job. This is our strength.

333. Another strength is our relationship with the mainland, as well as with other countries worldwide (international). As the China market and economy has a very important position internationally, a lot of our members want to grasp the knowledge about the market and economy. Therefore, HKFTU and the unions, universities, and the institutions related vocational training in the mainland cooperated to provide such courses to our members. Internationally, HKFTU also has cooperation with England and Australia in the area of adult education, and such cooperation are recognized by the corresponding governments. Therefore, our members learn and acquire vocational skill educational courses and they can possess more of the conditions for making a living. This is the strength of our service and therefore each season applicants are eager (yung yek).
334. Let me add that (bo chung), except with the mainland university and international institutions, we also have cooperation with local institutions, no matter it is Chinese University of Hong Kong, University of Hong Kong, or Polytechnic University. The cooperation is that we have some courses that are recognized by these universities. Students just need to follow university requirement and their credits earned from our courses will be recognized also in the university programmes. It makes our members who have started working early due to family problems, but they need to equip themselves more and more due to market demand, have opportunities to further study with university recognition from local university. This has been outstanding in recent 10 years.
335. The first difficulties we faced is limitation of resources. Since most of our members and workers could not afford expensive tuition fees, we face difficulties balancing the budget when organizing some more advanced or professional courses. The fact that there is no standardized qualification accreditation system in Hong Kong makes it difficult in designing course content.

We have to rely on what different industries need in terms of knowledge and skills.

336. In terms of improvement, or our main weakness, is that most of our training come from our own resources. Include looking for teachers and looking for venues to also that when we recruit students that we maintain the budget balance with tuition received. The cost is relatively high. But if you do not bear the cost we cannot organize further. Lack of resources is the major insufficiency/weakness of the union in organizing training and courses. Another is that though I have stated on the positive side that some courses are university recognized, we also heard quite often from members about the question of recognition. Frankly, only a few portion of courses who are cooperated with universities are recognized but majority of them are not recognized. Then it is another insufficiency. We stress that we hope the government to establish a system of vocational qualification recognition system in addition to tradition, normal grammar education. We have advocated the government to set up such system, thus making the development of Hong Kong education system in two directions. One is normal discipline, traditional grammar school/education, and the other is vocational training and education that the two compliment each other. But in the process we feel the system/policy (jai do) created our insufficiency.

337. *From the evolution of HKFTU's education service, HKFTU had spotted the gaps or inadequacies in different eras and organized courses according to the needs. It had established certain scale and it had initiated cooperation with overseas and mainland institutions to organize programmes to workers. The service had a lot of strengths but its development had been limited by its resources. Moreover, the fact that only a few portion of the courses were recognized courses also affected the service. Even if there were the qualification system, the service had to examine its direction of development because all the courses and participants had to go through standardized examinations for qualification and that implies getting the course material and instructors accredited, screening of participants, etc.*

338. *Any economical and / or sociological factors are affecting your education services?*

339. Sociological factors certainly influence the service because the reason that our courses get members' welcome largely depends on the fact that they match

market needs/demands. If you do not grasp the market needs, you will be eliminated soon. So when we organize courses, we focus on the demand, the market demand. If we feel the market demand is large, we organize. Just like in the early 90's that a lot of people wanted to learn Russian, German, and other languages and those were the market demand. There were also time that lots of people wanted to learn Japanese and we organized these courses because to the retail industry and other certain industries, the demand were large. And we need constant changes in the contents and information so that we can maintain our courses organized to be welcomed by our members.

340. Secondly, in the content and teaching materials, as the society economy is constantly changing, we change the content according to the economic structural change. You cannot have a course that does not change at all. We follow the changes to provide our education service so that when participants come to learn, they feel they can really learn the things that are very beneficial to their occupation. Then our service is successful. And this is the area we focus and care the most /care/aware (jerk yi, jerk gan). If not, we will be eliminated very quickly. Of course, other than these educational and training courses, in Hong Kong there is the "three-eight system/policy" (sam ba jai) that people have 1/3 of their time in entertainment, leisure, hobbies. Therefore we also provide such training to them in leisure and interests such as singing, learning how to play musical instruments, flowering, plantation, I believe that participants are not aiming at working in the area, but as a leisure and to cultivate the culture and spirit (ching chui). Such training is what we have other than vocational training. So these are the basics of our vocational education.

341. *Mr Cheng seemed to use market demand to represent more the demand from participants instead of the market/industrial demand. Participants demand would be influenced by market/industrial demand. For example, more people enroll in mandarin classes as it has become a required skill by different industries. It would be of the same importance to communicate with employers regarding their needs and wants. HKFTU had lots of connection with different unions and workers but it appeared lack of connection with employers was another weakness. It is perhaps the nature of Hong Kong employers that they pay relatively little attention on workers training and expressed little inputs on the training institutions.*

342. The definition of work changes under globalization and advancement of technology. Lots of skills and techniques workers possess gradually become

outdated. Therefore, we have to assist workers to add value to themselves and adjust to the changes. Since last financial crisis and worldwide economic downturn, lots of workers have been laid off or experiencing salary reduction. The only way for workers to stay competitive is to add value to themselves by further study. We will certainly adjust to the market trend in course design for workers. Since the handover to China, we have expanded in programmes organized with mainland institutions as we see the trend of development and opportunities in China.

343. Economic factors also affect. As unemployment is high and economy is not good, applicants decrease. We had some members who in one season applied nine courses and it was quite substantial. They had two courses in one evening. Such situation weakened when economic is bad. They do not apply that many, may be five courses or six. Our service is also influenced by external factors, fluctuations and the level of unemployment. However, as we still keep the quality of our service and we maintain the reputation, applicants will be kept, though people would apply lesser courses. There are some courses, like computer courses, are quite expensive and although they are still cheaper than other agencies, people will calculate and they will not apply those which are not needed immediately such as dancing class. People will apply courses related to occupation, more urgently needed and equipping themselves. However, the number of applicants which apply for one to two courses would increase but still the number of applicants is relatively weaker. Nevertheless, we have one advantage is that basically we are a federation of unions. We cooperate with different unions. For instance, we cooperate with textiles and garment unions to organize courses in fashion design and purchasing. We cooperate with hotel, food and beverage unions to organize courses in catering, cocktails mixing, etc. We cooperate with different unions because the instructors are working people in the corresponding industries and are in touch with the market. Therefore, what they teach would not be, like we have criticized the Vocational Training Council, outdated.

344. *The reduction in enrollment due to economic downturn and unemployment needed to be studied carefully. Worker need to upgrade themselves to compete with the adverse market situation. There would be reduction in those leisure and interest courses but the enrollment of vocational oriented courses would be increased. There is a possibility that the government subsidized institutions had taken away participants from HKFTU.*

345. *What would be the direction of development in your education services?*

346. HKFTU will continue to provide quality education service which follow closely with market needs and changes to members and workers. We will continue to advocate to the government for a systematic qualification accreditation system with comprehensive recognition by different industries.

347. Future development, as we see, economic structure reform has very big impacts to Hong Kong's economy. Such impacts are in fact a great challenge to our workers. Constant changes and reforms have been happening that in the past, hand craft industry had changed to manufacturing industry, and manufacturing industry had changed to service industry while service industry is constantly changing now. A portion of workers has been eliminated. So our strategies are how we can, before the changes or when it is changing, urgently provide skill upgrading to our members to ease them to change as required. For example, in hotels and restaurants, it was not needed for room keepers or waiters to key in the computer, but it is necessary now. So we need to provide such training to them so that when they are interviewed they have already acquired necessary knowledge and skills. In so doing, we can at least parallel with the pace of economic structural reform to prevent the workers from feeling insecure and helpless (pong wong) due to the reform. This is our basic consideration. We can say that HKFTU in future vocational education, its effect (jok yung), role and strategies are in how to upgrade workers' vocational skills. This is our biggest direction. Therefore, last year we have established a vocational training committee. We hope through establishing such committee our work in vocational training can be managed and coordinated (tung chou), and actively moving/driving the union to match with the government in how to face the challenges and requirements in vocational skills upgrading due to economic structural reform. And advocating the government to establish a vocational educational qualification recognition and accreditation system. These are our future union development strategies.

348. Changes in economic structure had created impacts and challenges not only to the workers but also to HKFTU's service. There had been constant changes in the economy and it would be difficult for the service providers in course design and organization. It is difficult to decide accurately what kind vocational skills and knowledge are needed. Although Mr Cheng had clear vision in upgrading workers' vocational skills to face the challenges posed by the market changes, a

clearer examination of the development and trend of the economic reform is very much required for the benefits of HKFTU and its members.

